

eData User Manual



**eData Reporting User's Guide
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eData Basics

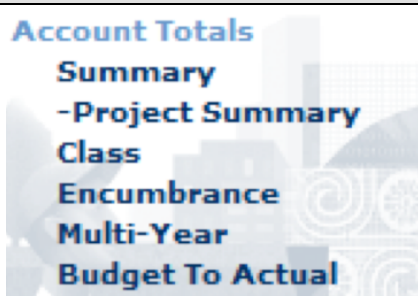
What's Changed with eData: WebFM to eData Job Aid

Purpose: The purpose of this job aid is to help you become more familiar with using eData. The tables below list and describe the reports you view in WebFM and compare them to the reports you will view in eData. In this job aid, you will review:

- Account Totals
- Account Details
- Sponsored Programs Financial Reports

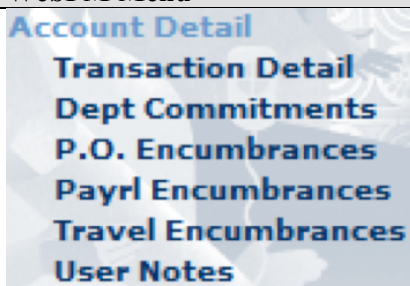
Account Totals

This table shows the **Account Totals** menu items in WebFM and their eData equivalent.

WebFM Menu	WebFM Reports	eData Portal Name: eData Reports
	WebFM: Account Totals, Summary	Financial Reporting: Financial Summary Reports, Financial Summary
	WebFM: Account Totals, Project Summary	Financial Reporting: Sub Account Reports, Sub Account Summary
	WebFM: Account Totals, Class	Financial Reporting: Financial Summary Reports, Object Summary by Consolidation, Level and Object
	WebFM: Account Totals, Encumbrance	Financial Reporting: Financial Summary Reports, Encumbrance Detail
	WebFM: Account Totals, Multi-Year	N/A for FY 14; Will be available for FY 15
	WebFM: Account Totals, Budget to Actual	Financial Reporting: General Funds Budget Reports

Account Details

This table shows the **Account Detail** menu items in WebFM and their eData equivalent.

WebFM Menu	WebFM Report	eData Portal Name: eData Report
	WebFM: Account Detail, Transaction Detail	Financial Reporting: Financial Summary Reports, Transaction Detail
	WebFM: Account Detail, Dept Commitments	Financial Reporting: Financial Summary Reports, Pre- Encumbrance Detail
	WebFM: Account Detail, P.O. Encumbrances	Financial Reporting: Financial Summary Reports, Encumbrance Detail
	WebFM: Account Detail, Payrl Encumbrances	
	WebFM: Account Detail, Travel Encumbrances	
	WebFM: Account Detail, User Notes	Financial Reporting: Financial Summary Reports, Account Overview, Notes

What's Changed with eData: WebFM to eData Job Aid

Sponsored Programs Financial Reports

This table shows the Sponsored Programs menu items in WebFM and their eData equivalent.

WebFM Menu	WebFM Document	eData Report or Attribute
Account Totals	WebFM: Sponsored Programs, Financial Report	Financial Reporting: SPA Financial Portal, SPA Financial Report
Summary	WebFM: Sponsored Programs, Account Totals	Financial Reporting: SPA Financial Portal, Account Totals Since Inception and Account Totals by Month
-Project Summary	WebFM: Sponsored Programs, Award Budget Browse	Financial Reporting: SPA Financial Portal, Budget Browse link
Class	WebFM: Sponsored Programs, Award Budgets	
Encumbrance	WebFM: Sponsored Programs, Award Listing	Financial Reporting: SPA Financial Portal, Account Listing link
Multi-Year	WebFM: Sponsored Programs, Award Summary	Financial Reporting: SPA Financial Portal, SPA Financial Report (header info and Account Overview link)
Budget To Actual	WebFM: Sponsored Programs, Class Tot by Bdgt Cd	Financial Reporting: SPA Object Portal, Transactions Reports To, Level, and Object
Account Detail	WebFM: Sponsored Programs, EASE Summary	No equivalent; this report will remain in WebFM. A link to this report is available in eData.
Transaction Detail	WebFM: Sponsored Programs, Indirect Cost Detail	Financial Reporting: SPA Financial Portal, SPA Financial Report (in the report header)
Dept Commitments	WebFM: Sponsored Programs, RMM IDC Distribution	Financial Reporting: SPA Financial Portal, RMM ICR Distribution Link
P.O. Encumbrances	WebFM: Sponsored Programs, RMM IDC Summary	Financial Reporting: SPA Object Portal, Select the Indirect Cost Object
Payrl Encumbrances	WebFM: Sponsored Programs, Terms & Conditions	Financial Reporting: SPA Financial Portal, SPA Financial Report, Account Overview link
Travel Encumbrances	WebFM: Browse, General	Browse Lists, General Browse
User Notes		
Sponsored Programs		
Financial Report		
Account Totals		
Award Bdgt Browse		
Award Budgets		
Award Listing		
Award Summary		
Class Tot by Bdgt Cd		
EASE Summary		
Indirect Cost Detail		
RMM IDC Distributn		
RMM IDC Summary		
Terms & Conditions		
Browse		
General		
Sponsored Programs		

How to Log In and Out of eData Job Aid

Purpose: The purpose of this job aid is to help you log in and out of eData. In this aid, you will find information regarding:

- Supported Browsers for eData
- How to Log In to eData
- How to Log Out of eData

Supported Browsers for eData

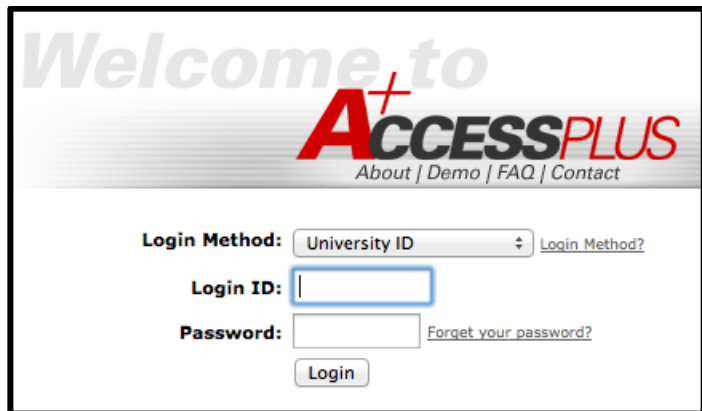
Use one of the following browsers to log into eData.

- Internet Explorer 9 or up
- Firefox 12
- Safari 6 or up (optional for Macs)

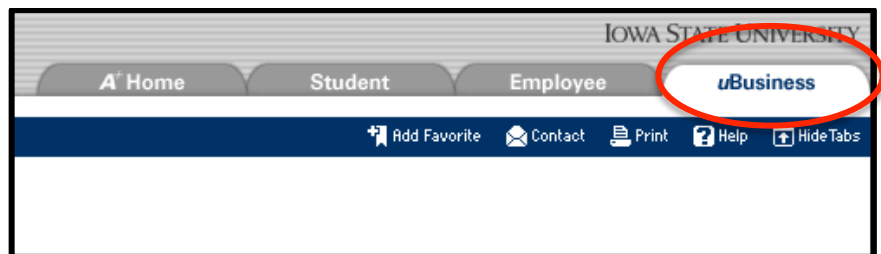
How to Log In to eData

Follow the numbered steps to get to the **eData** screen.

1. Open a recommended browser (Internet Explorer, Firefox, or Safari).
2. Navigate to www.accessplus.iastate.edu
3. Enter your **University ID** and **Password** to log into **AccessPlus**.

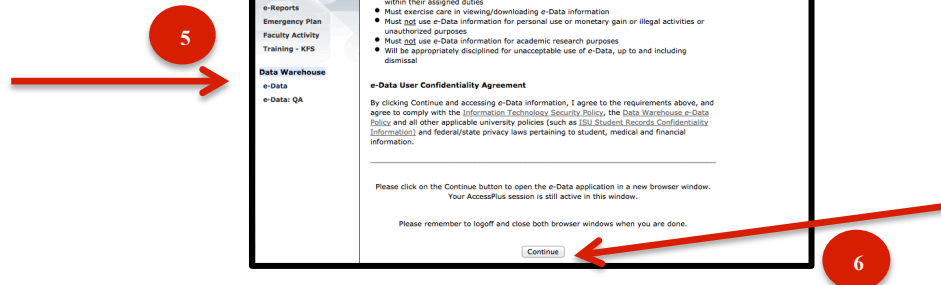


4. Click on the **uBusiness** tab on the far right of this screen.

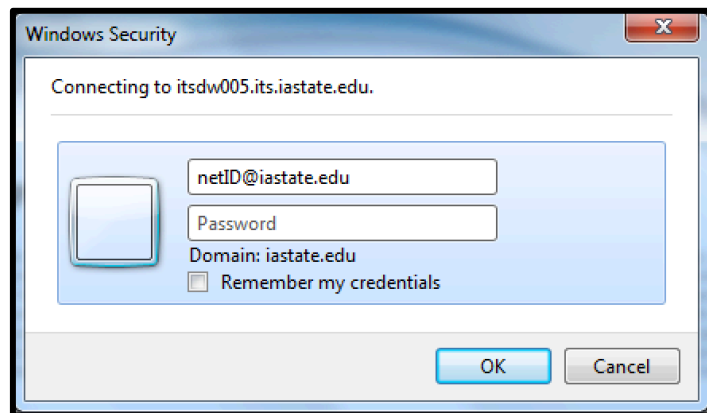


How to Log In and Out of eData Job Aid

5. Click **eData** under the **Data Warehouse** menu item on the left.
6. Click **Continue**.



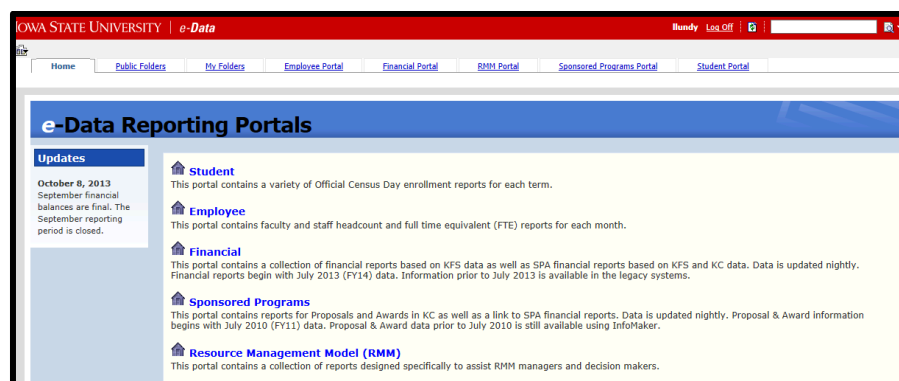
- 6a. If you receive this prompt enter your **ISU Email Address** and **Password** then; click **OK** to enter the **eData Reporting Portals** screen.



7. Click the appropriate **Reporting Portal** to begin viewing reports in **eData**.

Portals (written in blue) include:

- Student
- Employee
- Financial
- Sponsored Programs
- Resource Management Model



How to Log In and Out of eData Job Aid

How to Log Out of eData

Tabs in AccessPlus will remain open while you work in eData. When you are done working on reports, follow the numbered steps to safely log out of the **eData** and **AccessPlus**.

1. Close all open eData tabs.
2. Click **Log off** in the red area on the top right of the **eData** screens.



3. Logout of **AccessPlus**.
4. Close the tab and browser.



Understanding the eData Interface Job Aid

Purpose: This job aid will help you understand the eData interface and generate reports from University data. In this job aid, you will learn about:

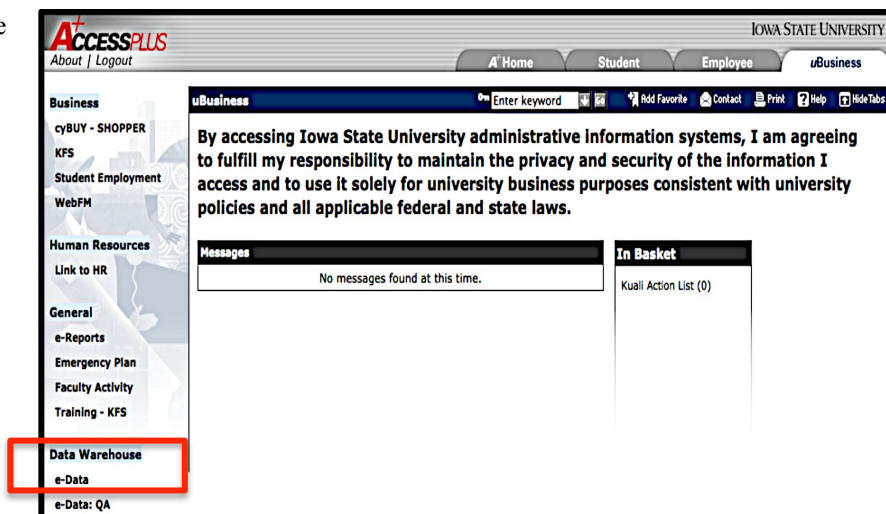
- Where University Data is Stored
- What Type of Data is Available
- How eData is Structured
- How You Want to View Your Data
- What Your Data Results Will Look Like
- How to Save or Print Your Data Results
- What Other Reports Are Available in eData

Where University Data is Stored

University data is stored in an online central repository called **eData**. The eData warehouse is made up of portals and sub-portals containing current and historical data gathered from a variety of University sources.

eData is accessible through the **uBusiness** tab in **AccessPlus** under **Data Warehouse**.

eData is used for business purposes only and limited to Iowa State University employees with **AccessPlus** login credentials.



Understanding the eData Interface Job Aid

What Type of Data is Available

eData is separated into five **portals**, which correspond to five types of data available:

- Student (Enrollment)
- Employee
- Financial
- Sponsored Programs
- Resource Management Model

Updates

The Updates box offers reminders about month-end, announcements, and other important notices about eData.

Confidentiality

The eData Confidentiality Statement at the bottom of the screen outlines the specific purpose and conditions for eData users.



The table below lists and describes the **portals** available in eData:

Portals	Description
Student	This portal contains Official Census Day Student Enrollment reports.
Employee	This portal contains faculty and staff headcount and full time equivalent (FTE) reports for each month.
Financial	This portal contains seven sub-portals that provide financial reports based on KFS and KC data. Data is updated nightly. Financial reports begin with July 2013 (FY14) data. Information prior to July 2013 is available in legacy systems.
Sponsored Programs	This portal contains reports of Proposals and Awards in KC as well as a link to SPA financial reports. Data is updated nightly. Proposal & Award information begins with July 2010 (FY11) data. Proposal & Award data prior to July 2010 is still available using InfoMaker.
Resource Management Model (RMM)	This portal contains a collection of reports designed specifically to assist RMM managers and decision makers.

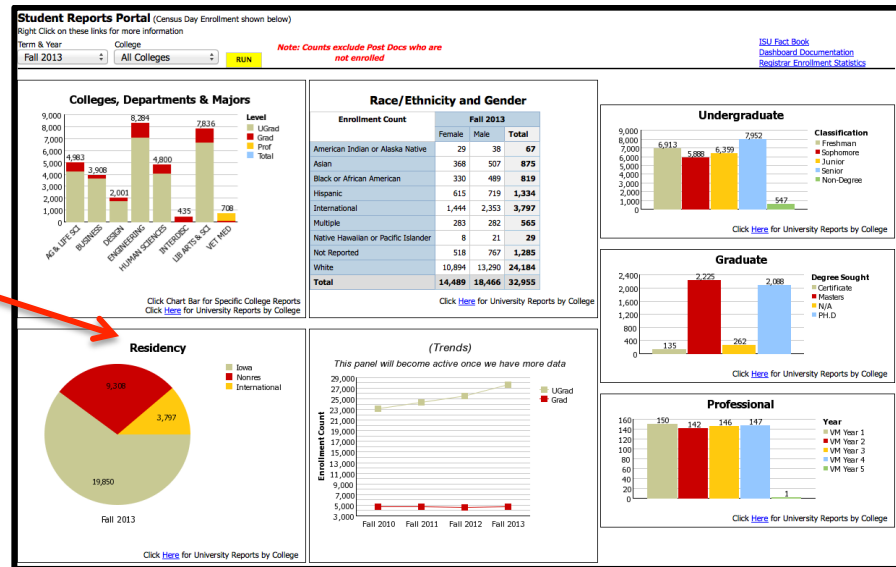
Understanding the eData Interface Job Aid

How eData is Structured

Behind each **portal** is a graphical display of **sub-portals** that further classify the types of data available:

The **sub-portal** you select will be based on the type of data you would like to view in a report.

For example, the **Residency** sub-portal within the **Student** portal contains university reports that provide student residency data.



The maps below illustrate the **portals**, **sub-portals**, and **reports** currently available in eData.

Student (Enrollment) Portal

eData Map: Student (Enrollment) Portal

AccessPlus, eData

Reporting Portal

- Student
- Employee
- Financial
- Sponsored Programs
- RMM

Colleges, Depts & Majors

- All College Student Enrollment
 - Level
 - Gender
 - Residency
 - Level and Gender
 - Level, Classification and Gender
 - Level, Classification and Residency
 - Residency and Gender
 - Ethnicity, Level and Gender
 - Major, Level, Classification and Gender
 - Major and Level
- Single College Student Enrollment
 - Level and Gender
 - Residency
 - Level, Classification and Gender
 - Level and Residency
 - Level, Classification and Residency
 - Residency and Gender
 - Ethnicity, Level and Gender
 - Major, Level, Classification and Gender
 - Major and Level
- Race/Ethnicity & Gender
 - College/Ethnicity by Gender
 - College/Ethnicity by Level and Gender
 - Ethnicity/College by Gender
 - Ethnicity/College by Level and Gender
 - Ethnicity/College by Level and Gender
- Residency
 - Residency
 - College/Residency by Gender
 - College/Residency by Level
 - College/Residency by Level and Gender
 - Residency/College by Gender
 - Residency/College by Level
 - Residency/College by Level and Gender
 - Global View
 - U.S. View
 - Iowa View
- Trends
- Undergraduate
 - College and Classification by Gender
 - College and Classification by Full/Part Time
 - College and Classification by Residency
 - Classification and College by Gender
 - College and Dept by Full/Part Time
 - College and Major by Full/Part Time
 - Major by College
- Graduate
 - Year and Gender
 - Year and Residency
 - ISU-UNL (Nebraska) Program
- Professional (Vet Med)
 - College and Degree Sought by Gender
 - College and Degree Sought by Residency
 - Degree Sought and College by Gender
 - College, Major Dept and Sought
 - Grad Major, Major Dept and College by Degree Sought

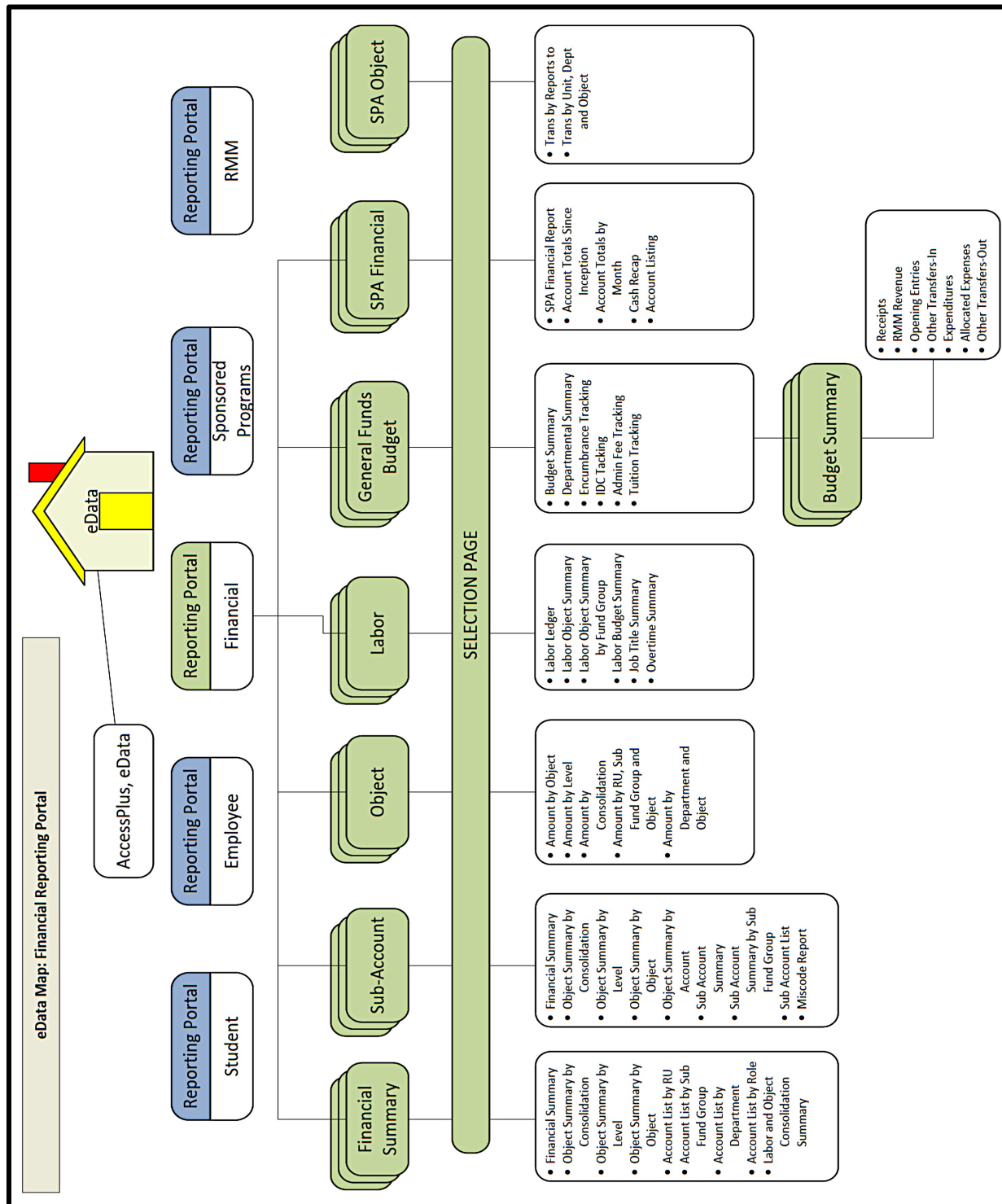
Student Enrollment Departmental Profile

- Major, Level and Gender
- Major and Residency
- Level, Classification and Gender
- Level and Residency
- Level, Classification and Residency
- Residency and Gender
- Ethnicity, Level and Gender
- Major, Level and Residency
- Major, Level, Classification and Gender
- Major and Level
- Major, Classification, Ethnicity and Gender – All Students
- Major, Classification Ethnicity and Gender – New Students
- Departmental Profile (All Reports)

Understanding the eData Interface Job Aid

Financial Portal

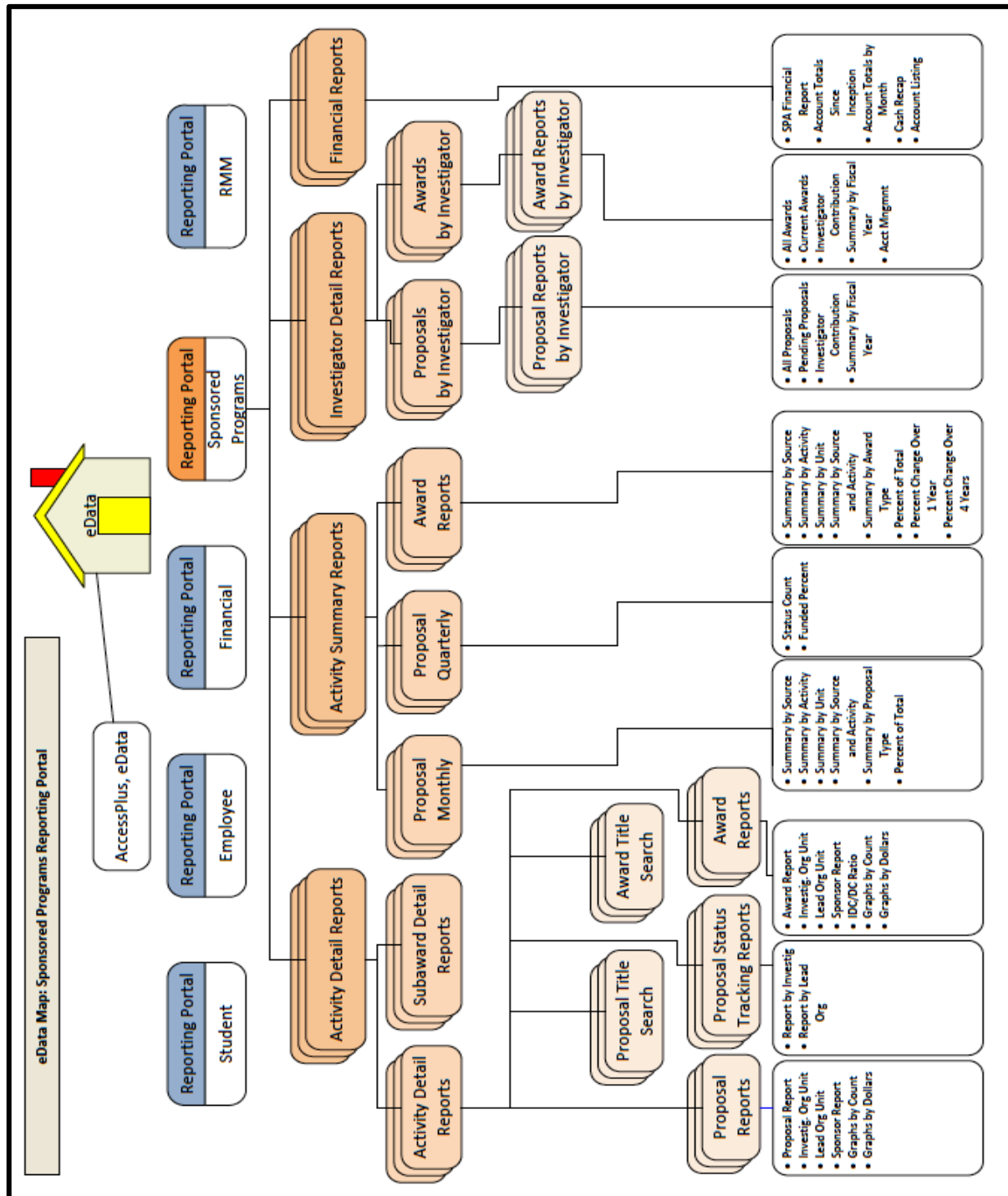
This map illustrates the **Financial Portal**, corresponding sub-portals, and available reports:



Understanding the eData Interface Job Aid

Sponsored Programs Portal

This map illustrates the **Sponsored Programs Portal**, corresponding sub-portals and available reports:



Understanding the eData Interface Job Aid

How You Want to View Your Data

Once you enter a **sub-portal** in eData, you can choose how you want to view your data using report and filter options:

Each screen displays a **Sub-portal Title** and **Report Type** at the top in bold.

A menu of **Reports** to choose from is available on the left side of the screen.

Report Filters allow you to further narrow your search to produce report details that meet your specific needs.

To generate a report:

1. Click a **Report** from the menu.
2. Select your **Filters**.
3. Click **Run**.

Headcount	Full-time	Part-time	Total
Home Unit			
Ag & LS College	690	1,188	1,878
Bus & Fin	743	415	1,158
Bus College	133	138	271
Design College	139	207	346
Engr College	429	1,136	1,565
Experiment Stn	107	82	189
Extension	226	94	320

Understanding the eData Interface Job Aid

What Your Data Results Will Look Like

Data results for your **Report** can be displayed in table or graph form:

Headers in your Report provide a summary of the **Report Filters** you selected to generate the report.

The **Footer** provides a summary of the **data results** available in the **Report**.

Top, Page up, Page down, and Bottom navigation links provide more information.

Consolidated Accounts

Org Unit
COLLEGE OF HUMAN SCIENCES
Org Department
KINESIOLOGY

Fund Group
All
Sub Fund Group
All

Resource Unit
All
Account
All

[Transaction Download](#)

Fiscal 2014 YTD thru Period 02				Fiscal Balance Forward	Receipts YTD	Transfer In YTD	Expenditures YTD
Org Department	Sub Fund Group	Account	Account Name				
KINESIOLOGY	GEN UNIV OTHER	7011070	KINESIOLOGY	0.00	0.00	216,125.40	15,105.40
		7015370	KIN GRAD TUITION SCHOLARSHIP	0.00	0.00	0.00	60,822.40
		GEN UNIV OTHER	0.00	0.00	216,125.40	75,927.80	
	GEN UNIV PERSONNEL	7041070	KINESIOLOGY	0.00	0.00	2,267,305.13	356,975.40
		7041071	KINESIOLOGY GRAD ASSTS	0.00	0.00	279,757.97	19,099.40
		GEN UNIV PERSONNEL	0.00	0.00	2,547,063.10	376,074.80	
	DISCRETIONARY	2021003	KIN COURSE FEES	249,575.64	39,774.90	38.41	50,528.40
		2029195	ARP-KINESIOLOGY	0.08	0.00	0.00	0.40
		2901006	WELK DISCRETIONARY	1,018.22	0.00	1,440.00	1,071.40
		2901049	KINESIOLOGY DEPT	23,309.75	0.00	0.00	222.40
		2901066	V. MILLER ART#88 CONVERSION	0.00	0.00	0.00	0.40
		DISCRETIONARY	273,903.69	39,774.90	1,478.41	51,822.40	
		FEE-FOR-SERVICE UNITS					
	FEE-FOR-SERVICE UNITS	2021002	FOOTWEAR TESTING	8,520.59	1,100.00	0.00	7,364.40
		2021008	SPEEDO	3,239.72	0.00	0.00	441.40
2021058		NWRC STORY CO OUTREACH	(221.49)	0.00	0.00	(1,697.40)	
2021062		SWINGPRO TRAINING BAT ASSESME	0.00	0.00	0.00	0.40	
2021075		ANTIBODY RESPONSE TO INFLUENZA	5,655.28	0.00	0.00	1,391.40	

Account List by Department: This report is a list of accounts by Org Department. Report includes balance forward, revenue, expense, encumbrance, and other data.
Dec 18, 2013

1

Top Page up Page down Bottom

Drill Downs that appear in your reports allow you to link to **Other Reports, Resources, and/or Supporting Documentation**. For best results, right click **Open Link in New Tab**.



Note: Refer to the section below called **What Other Reports Are Available in eData** for a list.

Original Document Number (KFS Organization Doc Number)	Org Ref Number (KFS Org Ref ID)	Origination Code (KFS Reference Origin Code)	Sub Account	Amount
TR0000000	391949	ED	R1R 67	
TR0000000	392943			10.00
	601225			10.00
	601226			10.00
C25265086	W10123			10.00

Open Link in New Tab
Open Link in New Window
Open Link in New Private Window
Bookmark This Link
Save Link As...
Copy Link Location
Inspect Element

How to Save or Print Your Data Results

The table below lists and describes the available **export options** in the eData portals:

Visual Cue	Description
	Click the Excel button to download the customized report to your desktop. This can be useful to further arrange, modify, or review the data.
	Click the PDF button to download the customized report to your desktop as a PDF. This can be helpful when communicating specific report results with others without any change in the data.

Understanding the eData Interface Job Aid

What Other Reports Are Available in eData

The table below lists and describes other reports available through links and drill downs in eData:

Report	Portal	Description
ISU Fact Book	Student Portal (Dashboard)	Links to the ISU Fact Book prepared by ISU Institutional Research. This electronic book contains profiles and comparisons of student, faculty, and institutional data.
Registrar Enrollment Statistics		Prepared by the Office of the Registrar, these enrollment reports are released on the 10 th academic day of each semester.
Browse Lists	All Financial Portals: Financial Summary; Sub-Account; Labor; Object; SPA Financial; SPA Object; General Fund Budget	This link goes to the General Browse screen, which offers a drop down lists of reports (i.e. Accounts, Fund Group, Payments, Org Code, etc.) you can generate lists by keyword.
Custom Reports		The Controller's Department creates these reports for one or more requesting org unit or department for a specific purpose. Some reports are available University Wide.
Help		Links directly to the Controller's Department website, where contact information and other support is available.
Account Overview		This link appears when a specific account from the account filter drop down has been selected. Provides an overview for one account and its associated attributes.
Transaction Download		This link appears when <u>no</u> specific account from the account filter drop down has been selected. It opens a calendar that prompts users to select days within or across a month and/or fiscal year. Once a calendar selection is made, the report is downloaded directly into an Excel spreadsheet.
Transaction Detail		This link appears when a specific account from the account filter drop down has been selected. Provides details (i.e. Tran Date, Description, Object, Doc Type, Sub-Accounts, etc.) of the transactions for the selected Account.
Encumbrance Detail		This link appears when a specific account from the account filter drop down has been selected. Report displaying details about earmarked funds. ISU Encumbrances are Purchase Orders (PO), Payroll Encumbrances (PE), Travel Encumbrances and Telecommunications Encumbrances (TE).
Pre-Encumbrance Detail		This link appears when a specific account from the account filter drop down has been selected. Summarizes the manually created commitments of unpaid amounts created by the user.
Intramural Cash Report		This link appears when a specific account with intramural income from the account filter drop down has been selected. Displays intramural revenue for University service providers.
Budget Browse	SPA Financial	A summary of award budgets that the PI has submitted through the OSPA Budget Form. This option appears below the Transaction Detail link when a specific account number is selected.
RMM ICR Distribution		Shows the Indirect Cost Recovery (ICR) distribution in percentage.
EASE Summary		Links to the current Employee Activity Summary of Effort (EASE) report in WebFM.
Support Forms	Sponsored Programs – Investigator Detail Reports	Links to completed “Current and Pending” or “Just in Time” support forms required by the National Science Foundation (NSF), US Department of Agriculture (USDA), and National Institute of Health (NIH).

Using Filters to Generate Reports Job Aid

Purpose: The purpose of this job aid is to help you use filters to generate reports in eData. Some portals in eData share a set of common filters that allow you to produce reports to fit your reporting needs. Other filters are unique to specific portals.

Note: Use of the **Run** button is not required for filters displayed in the report area.

In this job aid, you will learn about:

- Student (Enrollment) Portal Filters
- Financial Report Portal Filters
- Sponsored Programs Register Portal Filters

Student (Enrollment) Portal Filters

The **Student Portal** contains seven main portals in eData:

- College, Departments & Majors
- Race/Ethnicity and Gender
- Residency
- Trends
- Undergraduate
- Graduate
- Professional

The first portal, College, Departments & Majors, is divided into three sub-portals that include:

- All College Reports
- Single College Reports
- Departmental Profile Reports

The table below lists and describes filters common to the Student Portal:

Filter	Portal	Description
All Colleges	Colleges, Departments & Majors; All Colleges	Appears in the report area. Allows user to choose a view headcounts by individual college across student levels (Undergraduate, Graduate, or Professional) or a summarized view across levels.
College	All Portals*	Appears on the top left side of each screen. Allows user to select all colleges or a single college from the drop down menu. Includes Interdisciplinary Studies and Vet Med. <i>*Note:</i> Single College portal does not include an “All Colleges” filter.
Term	All Portals	Appears on the top left side of each screen. Allows user to select a specific term (Fall, Spring, or Summer) with year (i.e. 2013)

Using Filters to Generate Reports Job Aid

Financial Report Portal Filters

The **Financial Report Portal** contains seven sub-portals:

- Financial Summary Reports
- Sub-Account Reports
- Object Reports
- Labor Reports
- SPA Financial Reports
- SPA Object Reports
- Budget Reports

The table below (alphabetically) lists and describes filters common to Financial Report Portals:

Filter	Portal	Description
Account	All	This is the 7-digit account number. Use this filter to generate a report for a specific Account. The Transaction Detail report is available when a specific account number is selected.
Fund Group		Used to identify major groups of accounts such as General University Funds. Use this filter to select and view a Fund Group for a specific Resource Unit, Org Unit, Org Department, and/or Account.
Org Department		Previously known as the last three digits of the Org Code. This filter makes it easier to report by Org Departments that exist in multiple Org Units.
Org Unit		Previously known as the first two digits of the Org Code. Use this filter to select an Org Unit.
Resource Unit		Identifies the budget unit as defined under the Resource Management Model (RMM). Use this filter to select information by Resource Unit.
Sub Fund Group		Used to further breakdown Fund Group. Used to identify major groups of accounts such as General University Funds, which are broken down into General University Other and General University Personnel. Use this filter to select and view one or more Sub Fund Groups within a specific Fund Group.
Year, Calendar Type, Period, Month		Displays the data results for a given year, type (calendar, federal, fiscal), and period (Monthly Periodic, Quarterly Periodic, Month YTD and Quarter YTD) or single month.

Using Filters to Generate Reports Job Aid

The table below lists and describes filters unique to specific Financial Report Portals:

Filter	Portal	Description
Account Supervisor, Fiscal Officer, and Account Manager	Financial Summary; Account List by Role	View a list of accounts by Account Supervisor, Fiscal Officer, or Manager's name. These filters are displayed in the results section of the Account List by Role report.
Sub-Account	Sub-Acct	Sub-Accounts replace section/projects in the legacy system. Use this filter to view information about a Sub-Account assigned to a specific Account. Sub-Account drill downs in the results area link to Transaction Details.
Consolidation	Object and Labor	Use this filter to look at revenue and expense data by consolidated groups, i.e. Tuition and Fees.
Level	Object, Labor, and SPA Object	Allows users to look at revenue and expense data by Level within consolidated groups, i.e. Tuition.
Object Code		Allows users to look at revenue and expense data by Object within the Level and Consolidation, i.e. Resident Tuition. Available check boxes allow you to select and view multiple objects at once.
Employee	Labor	Use this filter to select an employee by name.
Sort by		Displayed in the results section: Depending on the report selected, sort by Account, Employee, RU, or Pay Base, and Job Title.
Job Title		Displayed in the results section: Allows users to view employee job titles. Use of the Run button is not required for this filter.
Fiscal Year	SPA Fin	Allows users to search for Proposals and Awards by fiscal year.
Principal Investigator		Account Manager for a sponsored program or a PI Incentive account. Changes to the PI name on accounts must be requested through OSPA but processed through Sponsored Programs Accounting (SPA) office, which will in turn update the Account Manager field. Please note that before OSPA or SPA can make changes in KC or KFS, sponsors must approve any changes to the PI on a sponsored program award.
Reports to Object	SPA Object	Aggregation of object codes that report to other object codes.
Rev Code		Used in processes and reports to define type of funding.

Sponsored Programs Register Portal Filters

The **Sponsored Programs Register Portal** contains five main portals, which separate detailed and summarized **Awards** and **Proposal** reports in eData:

- Activity Detail Reports
- Sub-Award Detail Reports
- Investigator Detail Reports
- Activity Summary Reports
- Financial Reports (links to SPA Financial Reports portal in eData)

Using Filters to Generate Reports Job Aid

Three of the five portals are divided into sub-portals:

- Activity Detail Reports
 - Proposal Report
 - Proposal Status Tracking Reports
 - Proposal Search
 - Award Reports
 - Award Search
- Investigator Detail Reports
 - Proposal Reports by Investigator
 - Award Reports by Investigator
- Activity Summary Reports
 - Proposal Monthly Reports
 - Proposal Quarterly Reports
 - Award (monthly) Reports

The table below (alphabetically) lists and describes filters common to the Sponsored Programs Register Portals:

Filter	Portal	Description
Activity Type	Activity Detail; Investigator Detail; Activity Summary	Allows user to limit search by activity type including: Academic Support, Institutional Support, Instruction, Operations & Maintenance, Public Service, Research, Scholarships & Fellowship, Student Financial Aid, and Student Services. Also displayed in the results section of Percent of Total reports in Proposal Monthly and Award (monthly) Reports.
Award Status	Activity Detail–Award Reports	Allows user to limit search by status of award, i.e. Active, Closed, Executed, Pending, Final, or Purged from KFS.
(Award) Register Date Between	Activity Detail–Award Reports; Subaward	Allows users to enter a date range to search for Awards or Subawards using calendar option filters.
Award Status	Activity Detail–Award Reports	Allows user to limit search by award status, i.e. Active, Executed, Pending, Purged from KFS, or Withdrawn/Declined.
Award Type	Activity Detail–Award Reports; Investigator Detail–Award Reports by Investigator	Allows user to limit search by award type, i.e. ISU Gift, IPA, Grant, Other, Cooperative Agreement, or Contract Type.
Category	Activity Summary–Proposal Monthly Reports and Award (monthly) Reports	Displayed in the results section of Summary by Source reports only: allows users to limit search by federal or non-federal data.
Graph	Activity Detail–Proposal Reports and Award Reports	Displayed in the results section of the Graph reports only: allows users to view graphs by Sponsor Type, Activity Type, Proposal/Award Status, or Lead Org Unit.

Using Filters to Generate Reports Job Aid

Filter	Portal	Description
Investigators	Activity Detail; Investigator Detail	Allows user to limit search by Investigator (PI or COI) assigned to the Account. Listed by Last Name, First Name, and Middle Initial (optional). Also displayed on the Investigator Detail Selection page. A filter in the results section of the Investigator Detail–Investigator Contribution report in both Proposals and Awards allows the user to Show Selected Investigators Only or Show All.
Investigator Org Dept	Activity Detail–Proposal Status Tracking Reports	Available under Report by Investigator report: Allows user to limit search by Org Dept to which investigator is assigned.
Investigator Org Unit	Activity Detail–Proposal Status Tracking Reports	Available under Report by Investigator report: allows user to limit search by Org Unit to which investigator is assigned.
Fiscal Year	Activity Summary	Allows users to search for Proposals and Awards by fiscal year.
Fund Group	Investigator Detail– Award Reports by Investigator	Displayed in the results section of Acct Mngmnt Summary report only: allows users to filter details by Fund Group or by Contracts & Grants Only.
Lead Org Dept	Activity Detail–Proposal Status Tracking Reports	Allows users to select by Org Dept in charge.
Lead Org Unit	Activity Detail–Proposal Status Tracking Reports; Activity Summary	Allows users to select by Org Unit in charge.
Month	Activity Summary	List months in the fiscal year (July through June).
Org Unit	Activity Detail	Previously known as the first two digits of the Org Code. Use this filter to select an Org Unit.
Org Dept	Activity Detail	Previously known as the last three digits of the Org Code. This filter makes it easier to report by Org Departments that exist in multiple Org Units.
Percent Spent	Investigator Detail– Award Reports by Investigator	Displayed in the results section of Acct Mngmnt Summary report only: allows users to filter results by percent spent for All Accounts, those Spent 90 – 99.9 % Spent 100%, or Overspent.
Proposal Status	Activity Detail–Proposal Reports	Allows user to limit search by status of proposal, i.e. Funded, Rejected, Pending, or Withdrawn.
(Proposal) Submit Date Between	Activity Detail–Proposal Reports and Proposal Status Tracking Reports; Investigator Detail– Proposal Reports by Investigator	Allows users to enter a date range to search for Proposal details using calendar option filters. Also available in the Proposal Reports by Investigator – Investigator Contribution report.
Proposal Type	Activity Detail–Proposal Reports; Investigator Detail–Proposal Reports by Investigator	Allows user to limit search by proposal type, i.e. New, Continuation, Renewal, and Supplement Proposal Types.
Report Choice	Activity Summary– Award (monthly) Reports	Displayed in the results section of the Percent Change Over 1 Year and Percent Change Over 4 Years reports only: allows user to sort by Source or Activity Type.

Using Filters to Generate Reports Job Aid

Filter	Portal	Description
Report Type	Activity Detail–Proposal and Award Reports; Activity Summary–Proposal Monthly and Award (monthly)	Displayed in the results section of Activity Detail–Sponsor Reports: users can filter results to View Sponsors (and prime sponsors), View Flow Through Only, View Flow Through and Sponsor, Non Federal Sponsors. View Flow Through and Sponsor offers an Account Number drill down. Available in results section of Awards Reports–IDC/DC Ratio for reports by Lead Org Unit or Sponsor Type. Also displayed in the results section of Proposal Monthly and Award (monthly) Reports offering graph of results by Month or Fiscal Trend.
Requisitioner	Subaward	Allows users to select from a list of individuals requesting the award, usually the investigator.
Sort by	Activity Detail; Investigator Detail; Subaward	Displayed in the results section in several portals: Used to sort by Sponsor Type, Activity Type, Status, Investigator Org Unit, and/or Lead Org Unit
Sort By	Activity Detail–Proposal Reports and Award Reports; Subaward; Investigator Detail–Proposal Reports by Investigator and Award Reports by Investigator	Displayed in the results section of the following reports: <ul style="list-style-type: none"> • Proposal Report (sort by Proposal Number or Proposal Amount) • Award Report (sort by Award Number, Investigator, Sponsor Number, or Awarded Amount) • Sponsor Report (sort by Sponsor Name or Sponsor Type) • All Proposals and Pending Proposals (sort by Proposal Number or Proposal Amount) • All Awards (sort by Award Number, Sponsor Number, or Awarded Amount) • Current Awards (sort by Award Number or End Date) • Subaward (sort by Sub Award Number, Award Number, or Sub Award Amount).
Sponsor Name	Activity Detail; Investigator Detail; Subaward	Allows user to limit search by Sponsor Name. Listed by Business Name.
Sponsor Type	Activity Detail; Investigator Detail	Allows user to limit search by sponsor type, i.e. commodity, local, state, and federal government, foreign, Higher Ed, non-profit orgs, industry, foundation, and more.
Sub Recipient	Subaward	Allows users select from a list of recipients of subawards.

For more information about eData portals and reports, refer to the **Understanding the eData Interface Job Aid**.



Financial Reporting

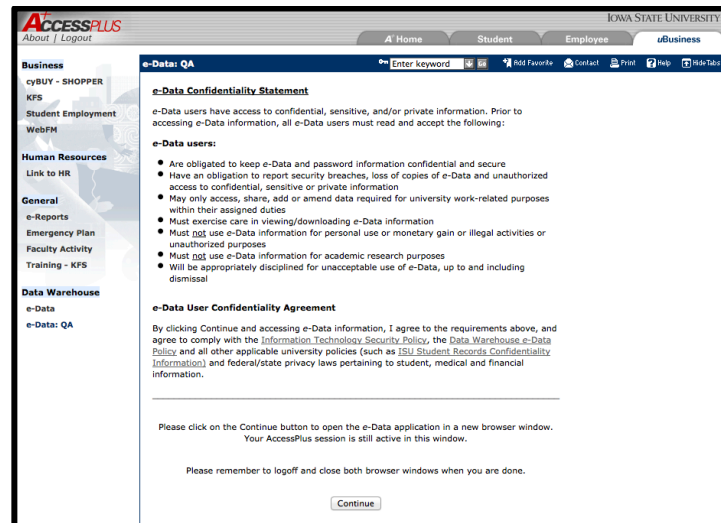
Quick Reference Guide: Generating Financial Summary Reports

Instructions: Use the steps below to generate **Financial Summary Reports** in eData. For more information about reports in eData, refer to the **Understanding the eData Interface Job Aid**.

Financial Summary Reports include:

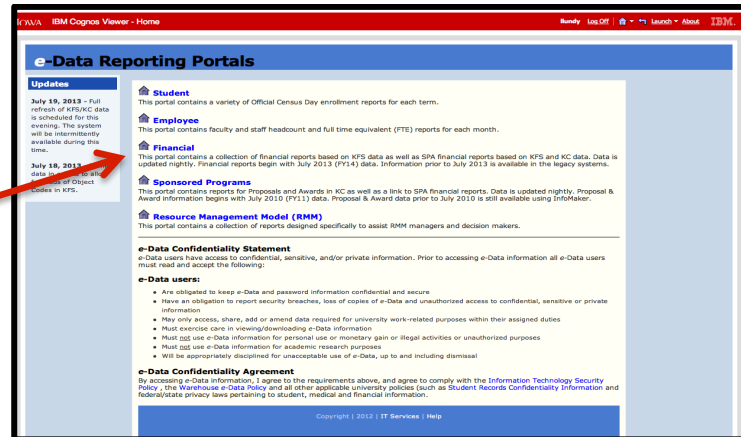
Report Type (Radio Buttons)	Description
Financial Summary	View summarized revenue, expense, encumbrance and balance totals.
Object Summary by Consolidation	View summarized revenue and expense totals broken down by object consolidation.
Object Summary by Level	View summarized revenue and expense totals broken down by object level.
Object Summary by Object	View summarized revenue and expense totals broken down by object code.
Account List by RU	View a list of accounts by RU. Report includes balance forward, revenue, expense, encumbrance, and balance totals.
Account List by Sub Fund Group	View a list of accounts by Sub Fund Group. Report includes balance forward, revenue, expense, encumbrance, and balance totals.
Account List by Department	View a list of accounts by Org Department. Report includes balance forward, revenue, expense, encumbrance, and balance totals.
Account List by Role	View a list of accounts by Account Supervisor, Fiscal Officer, or Account Manager.
Labor and Object Consolidation Summary	View a list of accounts summarized by object consolidation. The personnel object consolidation is broken down by object level.

1. Log into **AccessPlus** and enter your **University ID** and **Password**.
2. Click the **uBusiness** tab
3. Click **eData**, then **Continue**.

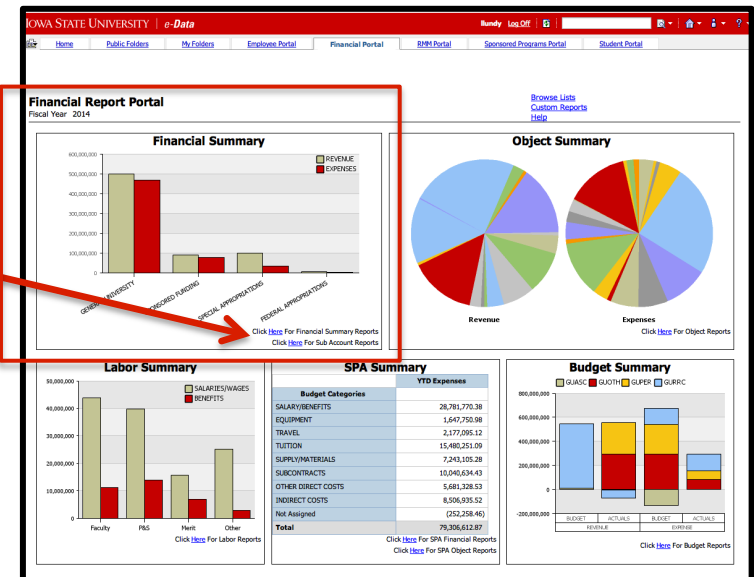


Quick Reference Guide: Generating Financial Summary Reports

- Click **Financial Reporting** on the blue homepage to enter the **Financial Report Portal**.



- Click **Here** for **Financial Summary Reports** on the **Financial Summary** graph.



Quick Reference Guide: Generating Financial Summary Reports

6. Choose on the **Selection Page** how you would like to enter the **Financial Summary Reports** page.

A) Select by Account

- Enter **Account Number**, and then click the green **Select** button.
- Click the **Run** button, which appears after you click **Select**.

B) Or Search

- Enter one or more Account Numbers or **Keywords** separated by spaces, and then click **Search**.
- Click the green **Select** button to enter the **Financial Summary Reports** page.

Note: You can choose your selected items from the **Results** box and click **Insert** to move them into the **Choice** box.

- C) Click one of the **underlined blue links** in the Fund Group, Sub Fund Group, Resource Unit, Org Department, or Org Unit boxes.

7. Select one **Report Title** from the **Report List** in the top left corner of the screen.

8. Select one or more **Report Filters** from the dropdown menus.

Quick Reference Guide: Generating Financial Summary Reports

9. Click the yellow **Run** button to produce a report.
10. Click the **Excel** or **PDF** buttons to view, download, or print reports.
11. Click one of the other underlined **blue links** to view detailed information or link to other portals.

The screenshot shows the Kuali Financial Portal interface. At the top, there are several blue links: [SPA Financial Portal](#), [Object Portal](#), [Sub Acct Portal](#), [Budget Portal](#), [Labor Portal](#), [Browse Lists](#), [Custom Reports](#), and [Help](#). Below these links are two dropdown menus: 'Source Unit' with 'DESIGN' selected, and 'Account' with 'Accounts' selected. To the right of these dropdowns is a yellow 'Run' button. Below the 'Run' button are two green buttons: 'Excel' and 'PDF'. A red circle with the number '10' is positioned over the 'Run' button. Two red arrows point from this circle: one to the 'Excel' button and another to the 'PDF' button. At the bottom left, there is a blue link: [Transaction Download](#).

Quick Reference Guide: Generating Sub-Account Reports

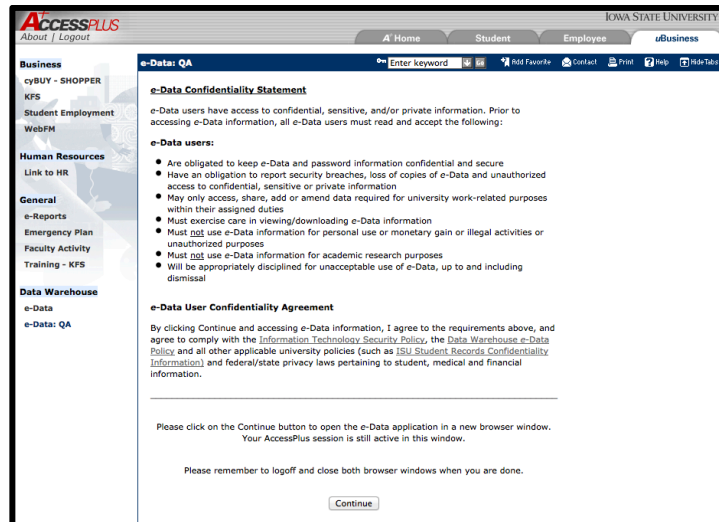
Instructions: Use the steps below to generate **Sub-Account Reports** in eData. For more information about reports in eData, refer to the **Understanding the eData Interface Job Aid**.

Sub-Accounts reports include:

Report Type (Radio Buttons)	Description
Financial Summary	View summarized revenue, expense, encumbrance, and balance totals for accounts and sub-accounts.
Object Summary by Consolidation	View summarized revenue and expense totals broken down by object consolidation.
Object Summary by Level	View summarized revenue and expense totals broken down by object level.
Object Summary by Object	View summarized revenue and expense totals broken down by object code.
Object Summary by Account	View summarized revenue and expense totals broken down by object code for each sub-account.
Sub Account Summary	View monthly activity statement, including balance carried forward at sub-account level, sorted by sub-account.
Sub Account Summary by Sub Fund Group	View monthly activity statement, including balance and uncommitted balance carried forward at sub-account level, sorted by sub-fund group.
Sub Account List	View a list of all sub-accounts associated with a specific account.
Miscode Report	Transactions that posted to an account with sub-accounts, that did not have sub-accounts assigned. These transactions previously posted as the 99-9999 section-project. They now post to the null, which is blank. This report summarizes these unassigned transactions for a given period.

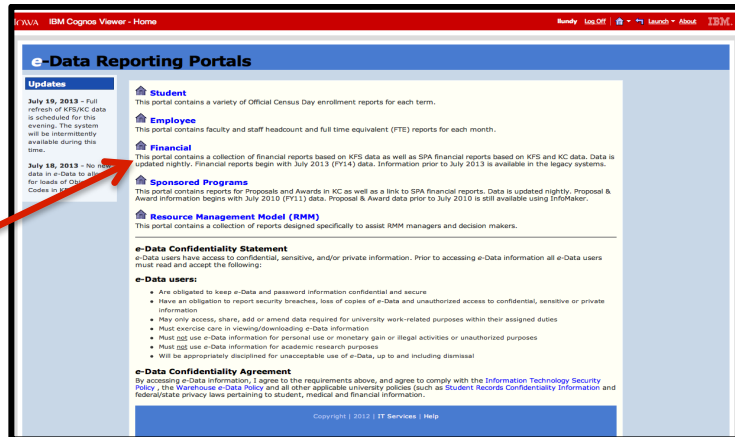
Note: You can view a summary of all Accounts and Sub-Accounts with activity in eData. Go to the main page, click Public Folders, Custom Reports, then University Wide, and select All Accounts Summary List.

1. Log into **AccessPlus** and enter your **University ID** and **Password**.
2. Click the **uBusiness** tab
3. Click **eData**, then **Continue**.



Quick Reference Guide: Generating Sub-Account Reports

- Click **Financial** on the blue homepage to enter the **Financial Report Portal**.



- Click **Here** for Sub Account Reports on the **Financial Summary** graph.



Quick Reference Guide: Generating Sub-Account Reports

6. Choose on the **Selection Page** how you would like to enter the **Sub Accounts Reports** page:

- A) Select by Account
 - Enter an **Account Number**.
 - Click the green **Select** button.
 - Click **Run**, which appears after you click **Select**.
- B) Or Search
 - Enter one or more Account Numbers or **Keywords** separated by spaces.
 - Click **Search** then **Run**.

Note: You can choose your selected items from the **Results** box and click **Insert** to move them into the **Choice** box.

- If the account has one or more sub-accounts, they will appear in the **Select by Sub Account** box.
- Select one or more Sub Accounts to enter the **Sub Account Reports** page.

C) Click one of the underlined blue links in the **Resource Unit**, **Org Unit**, or **Org Department** boxes.

7. Select one **Report Title** from the **Report List** in the top left corner of the screen.
8. Select one or more **Report Filters** from the dropdown menus.

Quick Reference Guide: Generating Sub-Account Reports

9. Click the yellow **Run** button to produce a report.
10. Click the **Excel** or **PDF** buttons to view, download, or print reports.
11. Click one of the other underlined **blue links** to view detailed information or link to other portals.

The screenshot displays the Kuali SPA Financial Portal interface. At the top, there are several blue underlined links: [SPA Financial Portal](#), [Object Portal](#), [Sub Acct Portal](#), [Budget Portal](#), [Labor Portal](#), [Browse Lists](#), [Custom Reports](#), and [Help](#). Below these links are three dropdown menus: 'Source Unit' (showing '-DESIGN'), 'Account' (showing 'Accounts'), and 'Accounts' (showing 'Accounts'). To the right of these dropdowns is a yellow 'Run' button. Below the 'Run' button are two green buttons: 'Excel' and 'PDF'. At the bottom left, there is a blue underlined link: [Transaction Download](#). A red circle with the number '10' is overlaid on the 'Run' button, with a red arrow pointing to it from the left. Another red arrow points from the 'Run' button to the 'Transaction Download' link.

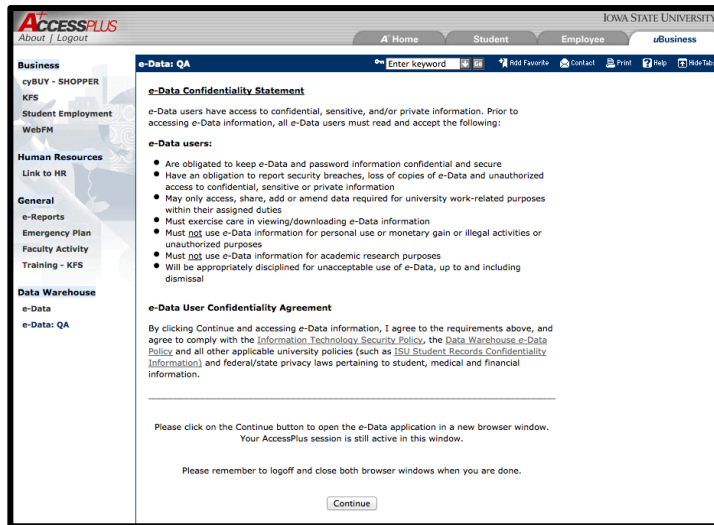
Quick Reference Guide: Generating Object Summary Reports

Instructions: Use the steps below to generate **Object Summary Reports** in eData. For more information about reports in eData, refer to the **Understanding the eData Interface Job Aid**.

Object Summary Reports include:

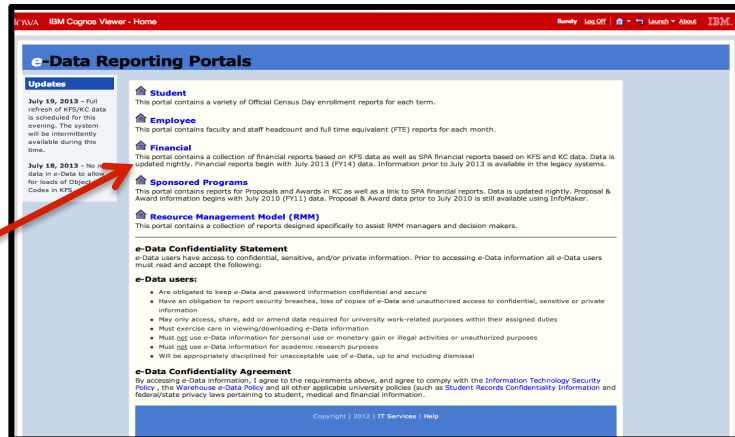
Report Type (Radio Buttons)	Description
Amount by Object	View account lists based on criteria selected; summarized by Revenue/Expense Type, Consolidation, Level, and Object Code.
Amount by Level	View account lists based on criteria selected; summarized by Revenue/Expense Type, Consolidation, and Level.
Amount by Consolidation	View account lists based on criteria selected; summarized by Revenue/Expense Type, and Consolidation.
Amount by RU, Sub Fund Group and Object	View account lists based on criteria selected; summarized by Resource Unit, Sub Fund Group, and Object.
Amount by Department and Object	View account lists based on criteria selected; summarized by Org Department and Object.

1. Log into **AccessPlus** and enter your **University ID** and **Password**.
2. Click the **uBusiness** tab
3. Click **eData**, then **Continue**.

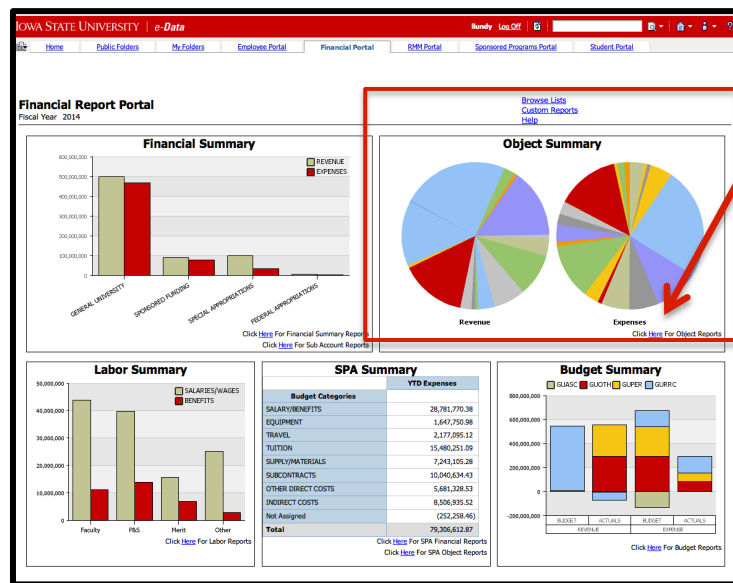


Quick Reference Guide: Generating Object Summary Reports

- Click **Financial** on the blue homepage to enter the **Financial Report Portal**.



- Click **Here** for **Object Reports** on the **Object Summary** graph.



Quick Reference Guide: Generating Object Summary Reports

- Click one of the **underlined blue links** on the **Selection Page** to enter the **Object Summary Reports** page.

Note: Select by Object allows multiple selections.

- Select one **Report Title** from the **Report List** in the top left corner of the screen.
- Select one or more **Report Filters** from the dropdown menus.

Quick Reference Guide: Generating Object Summary Reports

9. Click the yellow **Run** button to produce a report.
10. Click the **Excel** or **PDF** buttons to view, download, or print reports.
11. Click one of the other underlined **blue links** to link to other portals.

The screenshot shows a web interface for generating reports. It features two dropdown menus: 'Object Code' with 'All Object Codes' selected, and 'Resource Unit' with 'All Resource Units' selected. To the right of these menus is a list of blue underlined links: 'Financial Summary Portal', 'SPA Financial Portal', 'Sub Acct Portal', 'Budget Portal', 'Labor Portal', 'Browse Lists', 'Custom Reports', and 'Help'. At the bottom left, there is a yellow 'Run' button. To its right are two green buttons labeled 'Excel' and 'PDF'. The interface is enclosed in a black border with a red header bar.

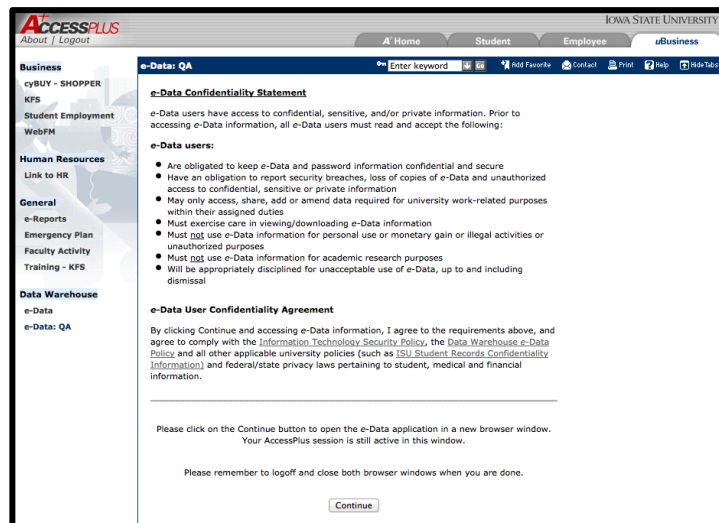
Quick Reference Guide: Generating Labor Summary Reports

Instructions: Use the steps below to generate **Labor Summary Reports** in eData. For more information about reports in eData, refer to the **Understanding the eData Interface Job Aid**.

Labor Summary Reports include:

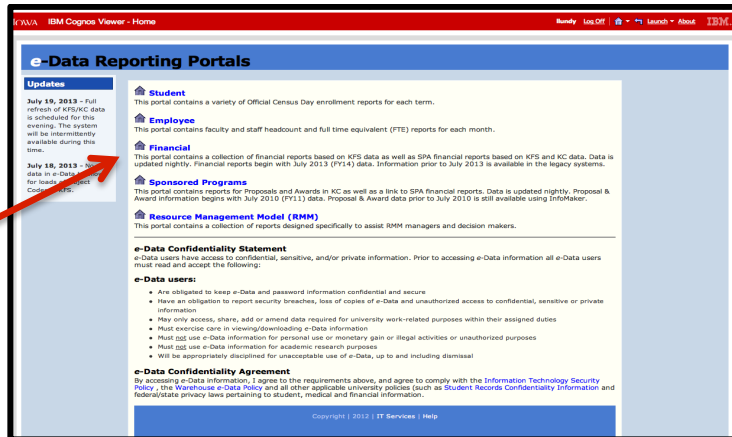
Report Type (Radio Buttons)	Description
Labor Ledger	View summarized salary, wages, benefits, and encumbrances by employee name, account, Resource Unit, or Pay Base.
Labor Object Summary	View summarized labor expenses by account and pay base as well as by object code.
Labor Object Summary by Fund Group	View summarized labor by object and pay base within fund groups.
Labor Budget Summary	View summarized labor expenses by account with budget displayed.
Job Title Summary	View employees by job title and pay base with monthly, YTD encumbrances and original encumbrance.
Overtime Summary	View monthly or YTD overtime pay, by employee or account.

1. Log into **AccessPlus** and enter your **University ID** and **Password**.
2. Click the **uBusiness** tab
3. Click **eData**, then **Continue**.

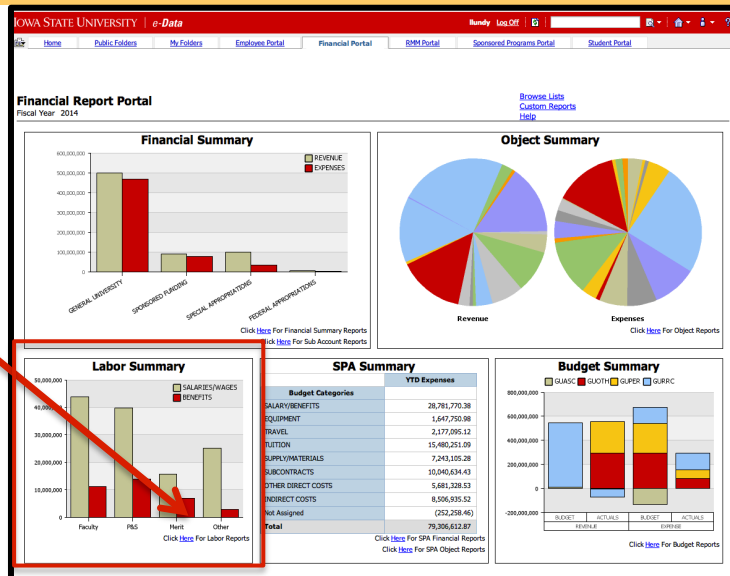


Quick Reference Guide: Generating Labor Summary Reports

- Click **Financial** on the blue homepage to enter the **Financial Report Portal**.



- Click **Here** for **Labor Reports** on the **Labor Summary** graph.



- Choose on the **Selection Page** how you would like to enter the **Labor Summary Reports** page.

Quick Reference Guide: Generating Labor Summary Reports

A) Click **Account Search** or **Employee Search** tab.

- Enter an Account Number or Employee Name or University ID.
- Click green **Select** then **Run** button, which appears after you click **Select**.

B) Or **Search**

- Enter one or more **Keywords** (or characters) separated by spaces, and then click **Search**.
- Click the green **Select** button to enter the **Labor Summary Reports** page.

Note: Choose your selected items from the **Results** box and click **Insert** to move them into the **Choice** box.

- ### C) Click one of the **underlined blue links** in the Fund Group, Sub Fund Group, Resource Unit, Org Department, or Org Unit boxes.

Quick Reference Guide: Generating Labor Summary Reports

7. Select one **Report Title** from the **Report List** in the top left corner of the screen.
8. Select one or more **Report Filters** from the dropdown menus.

IOWA STATE UNIVERSITY Labor Summary Reports Labor Ledger

Report List:

- ☒ Labor Ledger
- ☐ Labor Object Summary
- ☐ Labor Object Summary by Fund Group
- ☐ Labor Budget Summary
- ☐ Job Title Summary
- ☐ Overtime Summary

Sub Fund Group:

- All Sub Fund Groups
- RRC CONTROL
- GEN UNIV OTHER
- GEN UNIV PERSONNEL

9. Click the yellow **Run** button to produce a report.
10. Click the **Excel** or **PDF** buttons to view, download, or print reports.
11. Click one of the other underlined **blue links** to view detailed information or link to other portals.

Financial Summary Portal
SPA Financial Portal
Object Portal
Sub Acct Portal
Budget Portal
Browse Lists
Custom Reports
Help

Run Excel PDF

Transaction Download
Benefit Rate by Month

Quick Reference Guide: Generating SPA Financial Reports

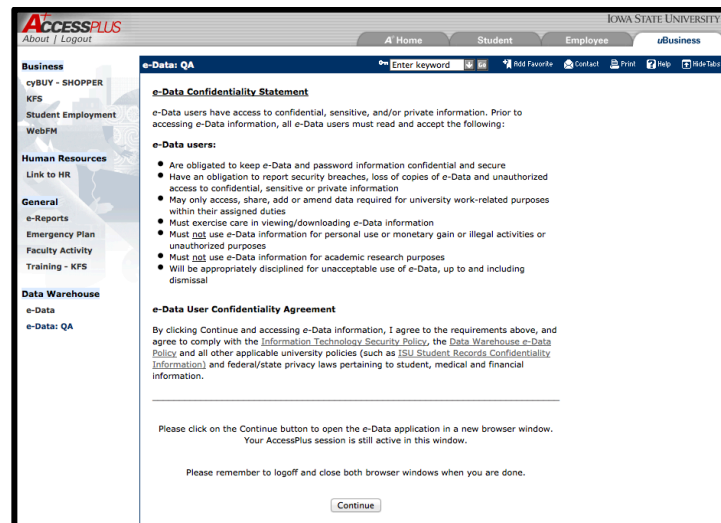
Instructions: Use the steps below to generate **SPA Financial Reports** in eData. For more information about reports in eData, refer to the **Understanding the eData Interface Job Aid**.

SPA Financial Reports include:

Report Type (Radio Buttons)	Description
SPA Financial Report	View reports with information about Sponsored Programs accounts, inception to date expenses, and balances in each budget category. Especially useful if an award has re-budget requirements.
Account Totals Since Inception	Shows inception to date expenses in each budget category as well as cumulative total revenue or expenses based on selected dates.
Account Totals by Month	Shows monthly totals in each budget category as well as monthly total expenses or monthly total revenue. A zero '0' in the field means total transactions net to '0'. A blank field means that there are no transactions for that budget category.
Cash Recap	Represents the "bottom line" of the report. Shows the totals from inception to current date for expenses and receipts, the current cash balance, and the percentage of funding spent. Offers an overview of accounts at-a-glance.
Account Listing	Available when more than one account is selected. Shows the accounts that you have consolidated and allows you to sort the accounts in several ways.

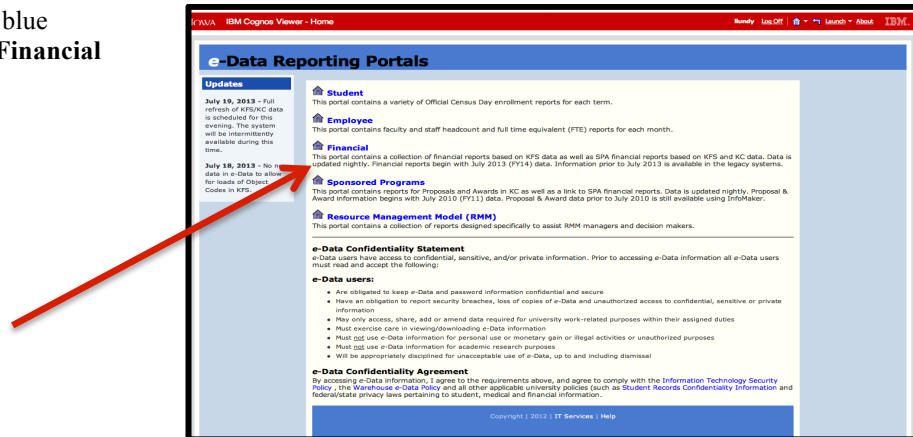
Note: When an account number is selected in the SPA Financial Summary portal, the **Budget Browse** option appears below the **Transaction Detail** link. Budget Browse is a summary of award budgets that the Principal Investigator (PI) has submitted through the OSPA Budget Form.

1. Log into **AccessPlus** and enter your **University ID** and **Password**.
2. Click the **uBusiness** tab
3. Click **eData**, then **Continue**.

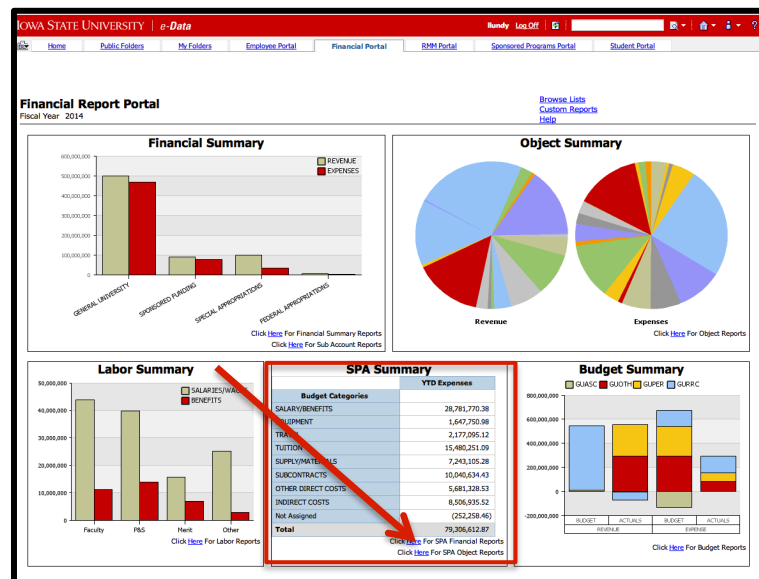


Quick Reference Guide: Generating SPA Financial Reports

- Click **Financial** on the blue homepage to enter the **Financial Report Portal**.



- Click **Here** for SPA Financial Reports on the SPA Summary graph.



Quick Reference Guide: Generating SPA Financial Reports

6. Choose on the **Selection Page** how you would like to enter the **Sponsored Programs Financial Reports** page.

A) Select by Account

- Enter **Account Number**, and then click the green **Select** button.
- Click the **Run** button, which appears after you click **Select**.

B) Or Search

- Enter one or more **Account Numbers** or **Keywords** separated by spaces, and then click **Search**.
- Click the green **Select** button to enter the **Sponsored Programs Financial Reports** screen.

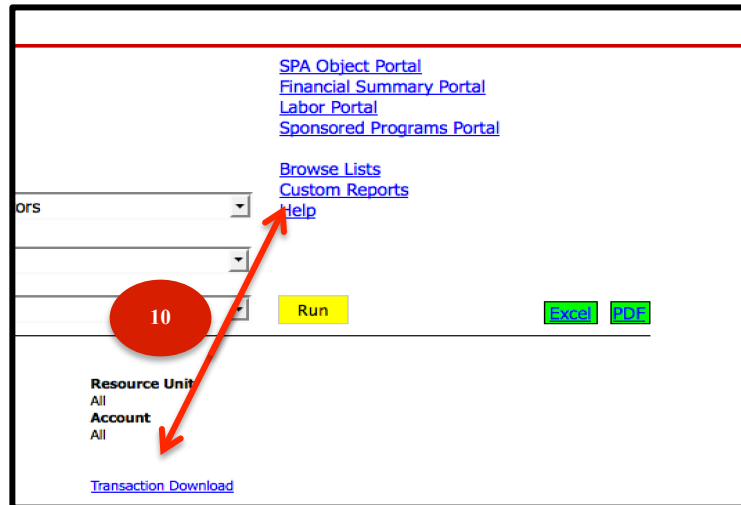
Note: You can choose your selected items from the **Results** box and click **Insert** to move them into the **Choice** box.

C) Click one of the **underlined blue links** in the Select by Investigator, Resource Unit, Org Unit, Org Department, Sub Fund Group, or Control Account boxes.

7. Select one **Report Title** from the **Report List** in the top left corner of the screen.
8. Select one or more **Report Filters** from the dropdown menus.

Quick Reference Guide: Generating SPA Financial Reports

9. Click the yellow **Run** button to produce a report.
10. Click the **Excel** or **PDF** buttons to view, download, or print reports.
11. Click one of the other underlined **Blue Links** to view detailed information or link to other portals.



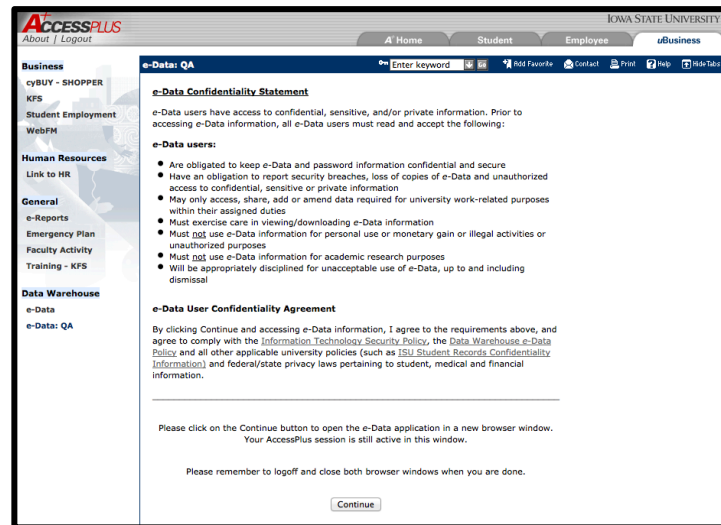
Quick Reference Guide: Generating SPA Object Reports

Instructions: Use the steps below to generate SPA Object Reports in eData. For more information about reports in eData, refer to the **Understanding the eData Interface Job Aid**.

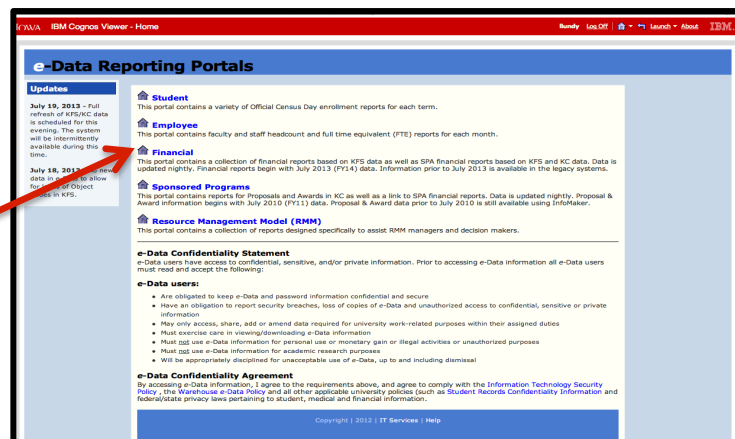
SPA Object Reports include:

Report Type (Radio Buttons)	Description
Trans by Reports To, Level and Object	Shows transactions by object codes that report to other object codes, then by level and object. Account numbers link to more details on the account.
Trans by Unit, Dept and Object	Shows transactions by name of resource unit, department, and object. Account numbers link to more details on account.

1. Log into AccessPlus and enter your **University ID** and **Password**.
2. Click the **uBusiness** tab
3. Click **eData**, then **Continue**.

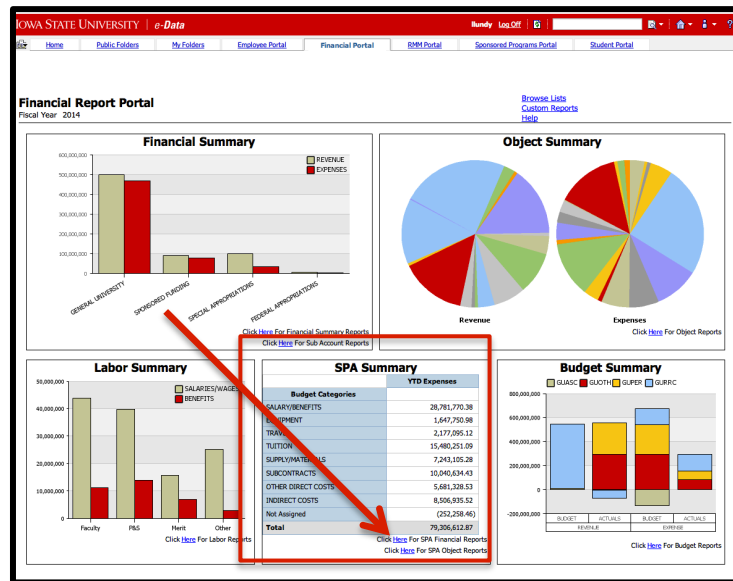


4. Click **Financial** on the blue homepage to enter the **Financial Report Portal**.



Quick Reference Guide: Generating SPA Object Reports

- Click [Here](#) for SPA Object Reports on the SPA Summary graph.



- Click one of the **underlined blue links** in the boxes (Select by Org Unit, Org Department, Level, Report To Object, or Object) on the **Selection Page** to enter the SPA Object Reports page.

The screenshot shows the SPA Object Portal Selection Page. It contains four selection boxes: 'Select by Org Unit', 'Select by Org Department', 'Select by Level', and 'Select by Object'. Each box lists various organizational units, departments, levels, and objects with corresponding codes. The 'Select by Object' box is highlighted with a red box.

Object	Object Code
GENERAL APPROPRIATIONS	0011
CAPITAL APPROPRIATIONS	0013
OTHER TUITION	0024
DEFERRED BILLING FEE	0033
SPECIAL COURSE FEE	0038
OTHER FEES	0044
DELIVERY FEE	0045
STUDENT AID/STUDENT FEE	0046
MSC SALES & SERVICES	0049
SALE OF CAPITAL ASSETS	0059
ROYALTY INCOME	0061
INDIRECT COST	0062
MSC OTHER INCOME	0069

Quick Reference Guide: Generating SPA Object Reports

7. Select one **Report Title** from the **Report List** in the top left corner of the screen.
8. Select one or more **Report Filters** from the dropdown menus.

The screenshot shows the 'IOWA STATE UNIVERSITY SPA Object Reports' form. A red circle with the number '6' points to the 'Trans by Reports To, Level and Object' radio button. Another red circle with the number '7' points to the 'Org Unit' dropdown menu, which is currently set to 'COLLEGE OF DESIGN'. Other visible fields include 'Level' (All Level Codes), 'Reports to Object' (All Reports To Codes), 'Year' (2012), 'Calendar Type' (Fiscal), 'Period' (Month Periodic), and 'Org Department' (All Org Departments).

9. Click the yellow **Run** button to produce a report.
10. Click the **Excel** or **PDF** buttons to view, download, or print reports.
11. Click one of the other underlined **blue links** to view detailed information or link to other portals.

The screenshot shows the results page of the SPA Object Reports. A red circle with the number '9' points to the yellow 'Run' button. A red arrow points from the 'Run' button to the 'Transaction Download' link at the bottom left. Other links visible include 'SPA Object Portal', 'Financial Summary Portal', 'Labor Portal', 'Sponsored Programs Portal', 'Browse Lists', 'Custom Reports', and 'Help'. At the bottom right, there are 'Excel' and 'PDF' buttons. The 'Resource Unit' and 'Account' are both set to 'All'.

Quick Reference Guide: Generating General Fund Budget Reports

Instructions: Use the steps below to generate **General Fund Budget Reports** and **Budget Detail Reports** in eData. For more information about reports in eData, refer to the **Understanding the eData Interface Job Aid**.

General Fund Budget Reports include:

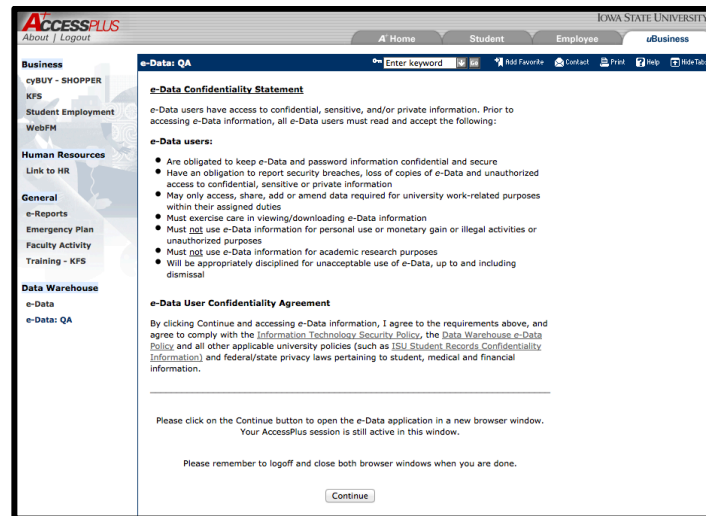
Report Type (Radio Buttons)	Description
Budget Summary	Summarizes Budgeted and Actual revenue and expenses for one or more Resource Units (RUs). This report also includes any Variance, Encumbrance, and totals for Variance with Encumbrance.
Departmental Summary	Summarizes budgeted and actual revenue and expenses for one or more Resource Units. It also shows the Budgeted and actual expense for each Org Department within the RU(s) selected. This report also includes any Variance, Encumbrance and totals for Variance with Encumbrance.
Encumbrance Tracking	View Current Cash Balance, Encumbrances (Payroll, PO, Telecom, and Travel), and Current Free Balance by Org Department and Sub Fund Group.
ICR Tracking	This report is displayed in two tables. The top table summarizes revenue and percentage of Indirect Cost Recovery (ICR) for one or more RUs. This is the revenue received in the RRC Control account (711-XX-XX). The bottom table displays the ICR by Org Department and object code.
Admin Fee Tracking	This report shows the total Admin Overhead income received in the RRC Control account (711-XX-XX) for each RU. It further breaks down income based on the department the generated the income.
Tuition Tracking	View summarized Tuition Budget, Revenue and Variance by term (Summer, Fall and Spring). The table sorts Undergraduate, Graduate and Professional student levels and breaks down Differential, Enrollment and Student Credit Hours tuition.

General Fund Budget Detail Reports offer revenue and expense details and include:

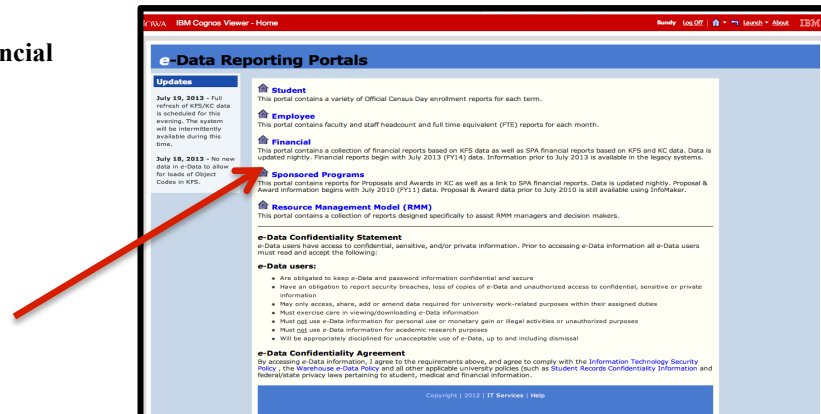
Report Type (Radio Buttons)	Description
All	All budgeted and actual revenue (Receipts, RMM revenue, Other Transfers-In) and expenses (Expenditures, Allocated Expenses, Other Transfers-Out). This report also shows variance for revenue and expenses, encumbrance and variance with encumbrance. Report shows Object Level and Object Code detail.
Receipts	View budget and actual receipts by Object Level and Object Code.
RMM Revenue	View budgeted and actual RMM Revenue by Object Level and Object Code.
Opening Entries	View Opening Entries by Object Level and Object Code.
Other Transfers-In	View Other Transfers-In by Object Level and Object Code.
Expenditures	View budgeted, actual and encumbered expenditures by Object Level and Object Code.
Allocated Expenses	View budgeted and actual allocated expenses by Object Level and Object Code.
Other Transfers-Out	View Other Transfers-Out by Object Level and Object Code.

Quick Reference Guide: Generating General Fund Budget Reports

1. Log into AccessPlus and enter your University ID and Password.
2. Click the **uBusiness** tab
3. Click **eData**, then **Continue**.

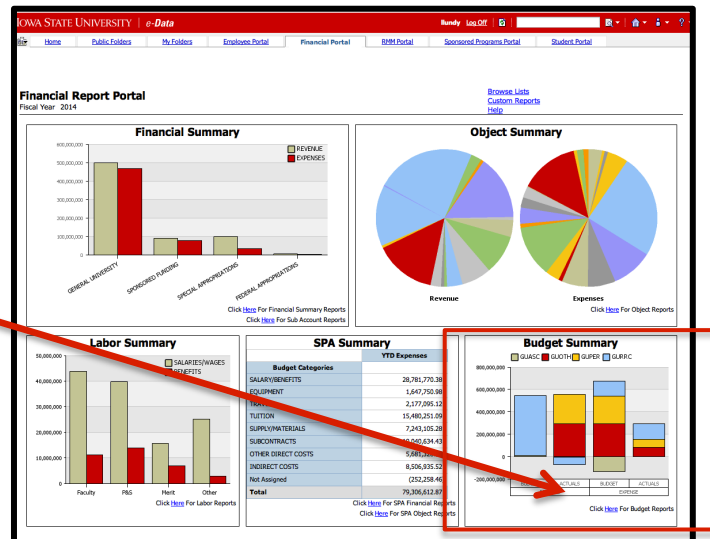


4. Click **Financial** on the blue homepage to enter the **Financial Reporting Portal**.



Quick Reference Guide: Generating General Fund Budget Reports

Click [Here](#) for Budget Reports under the Budget Summary graph.



5. Choose one or more **Resource Units** on the **Selection Page**.

6. Click **Select** then **Run**.

Note: The yellow **Run** button will appear once you click the green **Select** button.

IOWA STATE UNIVERSITY General Fund Budget Portal
Selection Page

Select by Resource Unit

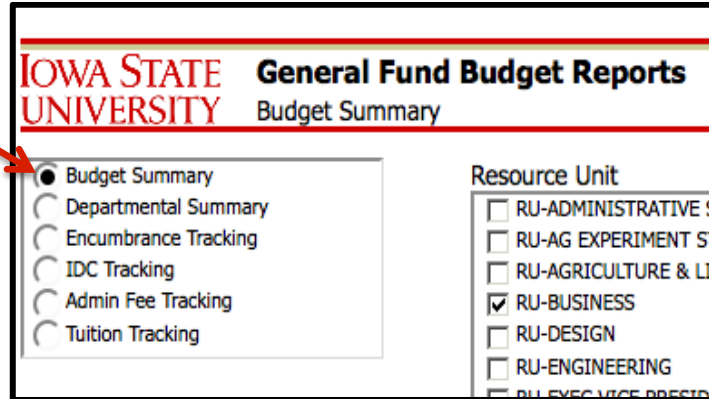
- ☐ RU-ADMINISTRATIVE SUPPORT PROGRAMS
- ☐ RU-AG EXPERIMENT STATION
- ☐ RU-AGRICULTURE & LIFE SCIENCES
- ☒ RU-BUSINESS
- ☐ RU-DESIGN
- ☐ RU-ENGINEERING
- ☐ RU-EXEC VICE PRESIDENT AND PROVOST
- ☐ RU-EXTENSION
- ☐ RU-FACILITIES SERVICES
- ☐ RU-HUMAN SCIENCES
- ☐ RU-INFORMATION TECHNOLOGY SERVICES
- ☐ RU-INSTITUTIONAL EXCELLENCE FUND
- ☐ RU-LIBERAL ARTS & SCIENCES
- ☐ RU-LIBRARY
- ☐ RU-PRESIDENT
- ☐ RU-SENIOR VP AND PROVOST
- ☐ RU-STUDENT FINANCIAL AID/SCHOLARSHIPS
- ☐ RU-SUSPENSE
- ☐ RU-UNIVERSITY LEADERSHIP
- ☐ RU-VETERINARY MEDICINE
- ☐ RU-VP FOR BUSINESS & FINANCE ASC
- ☐ RU-VP FOR BUSINESS & FINANCE RRC
- ☐ RU-VP FOR RESEARCH & ECONOMIC DEVELOP
- ☐ RU-VP FOR RESEARCH & ECONOMIC DEVELOP
- ☐ RU-VP FOR STUDENT AFFAIRS ASC
- ☐ RU-VP FOR STUDENT AFFAIRS RRC

[Select all](#) [Deselect all](#)

Select **Run**

Quick Reference Guide: Generating General Fund Budget Reports

7. Select one **Report Title** from the **Report List** in the top left corner of the screen.



IOWA STATE UNIVERSITY General Fund Budget Reports
Budget Summary

Report List:

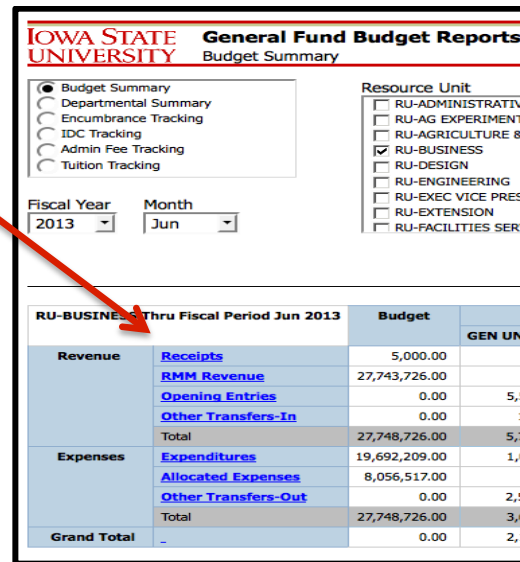
- ☒ Budget Summary
- ☐ Departmental Summary
- ☐ Encumbrance Tracking
- ☐ IDC Tracking
- ☐ Admin Fee Tracking
- ☐ Tuition Tracking

Resource Unit:

- ☐ RU-ADMINISTRATIVE S
- ☐ RU-AG EXPERIMENT S
- ☐ RU-AGRICULTURE & LI
- ☒ RU-BUSINESS
- ☐ RU-DESIGN
- ☐ RU-ENGINEERING
- ☐ RU-EXEC VICE PRES

Budget Detail reports are available through the **Budget Summary** report. Each link opens a new tab to the **General Fund Budget Detail** report illustrated in step 9 below.

8. Click one of the **blue links** in the report area.



IOWA STATE UNIVERSITY General Fund Budget Reports
Budget Summary

Report List:

- ☒ Budget Summary
- ☐ Departmental Summary
- ☐ Encumbrance Tracking
- ☐ IDC Tracking
- ☐ Admin Fee Tracking
- ☐ Tuition Tracking

Resource Unit:

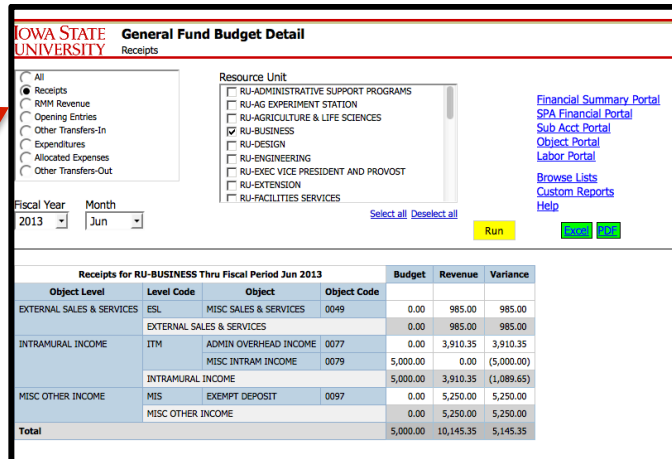
- ☐ RU-ADMINISTRATIVE
- ☐ RU-AG EXPERIMENT
- ☐ RU-AGRICULTURE &
- ☒ RU-BUSINESS
- ☐ RU-DESIGN
- ☐ RU-ENGINEERING
- ☐ RU-EXEC VICE PRES
- ☐ RU-EXTENSION
- ☐ RU-FACILITIES SERV

Fiscal Year: 2013 Month: Jun

RU-BUSINESS Thru Fiscal Period Jun 2013		Budget	GEN UN
Revenue	Receipts	5,000.00	
	RMM Revenue	27,743,726.00	
	Opening Entries	0.00	5,5
	Other Transfers-In	0.00	1
	Total	27,748,726.00	5,7
Expenses	Expenditures	19,692,209.00	1,0
	Allocated Expenses	8,056,517.00	
	Other Transfers-Out	0.00	2,5
	Total	27,748,726.00	3,6
Grand Total	-	0.00	2,2

Quick Reference Guide: Generating General Fund Budget Reports

9. Click one of the radio buttons on the **General Fund Budget Detail** report to show other detailed reports.



IOWA STATE UNIVERSITY General Fund Budget Detail
Receipts

☒ All
☐ Receipts
☐ RHM Revenue
☐ Opening Entries
☐ Other Transfers-In
☐ Expenditures
☐ Allocated Expenses
☐ Other Transfers-Out

Resource Unit

☐ RU-ADMINISTRATIVE SUPPORT PROGRAMS
☐ RU-AG EXPERIMENT STATION
☐ RU-AGRICULTURE & LIFE SCIENCES
☒ RU-BUSINESS
☐ RU-DESIGN
☐ RU-ENGINEERING
☐ RU-EXEC VICE PRESIDENT AND PROVOST
☐ RU-EXTENSION
☐ RU-FACILITIES SERVICES

[Financial Summary Portal](#)
[SPA Financial Portal](#)
[Sub Acct Portal](#)
[Object Portal](#)
[Labor Portal](#)
[Browse Lists](#)
[Custom Reports](#)
[Help](#)

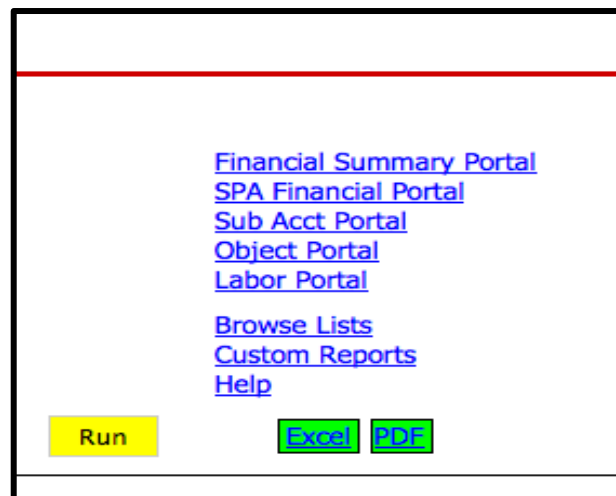
Fiscal Year: 2013 Month: Jun

Select all Deselect all

Run

Receipts for RU-BUSINESS Thru Fiscal Period Jun 2013				Budget	Revenue	Variance
Object Level	Level Code	Object	Object Code			
EXTERNAL SALES & SERVICES	ESL	MISC SALES & SERVICES	0049	0.00	985.00	985.00
		EXTERNAL SALES & SERVICES		0.00	985.00	985.00
INTRAMURAL INCOME	ITM	ADMIN OVERHEAD INCOME	0077	0.00	3,910.35	3,910.35
		MISC INTRAM INCOME	0079	5,000.00	0.00	(5,000.00)
		INTRAMURAL INCOME		5,000.00	3,910.35	(1,089.65)
MISC OTHER INCOME	MIS	EXEMPT DEPOSIT	0097	0.00	5,250.00	5,250.00
		MISC OTHER INCOME		0.00	5,250.00	5,250.00
Total				5,000.00	10,145.35	5,145.35

10. Click the yellow **Run** button to produce a **Budget Summary** or **Budget Detail** report from the selected radio buttons.
11. Click the **Excel** or **PDF** buttons to view, download, or print reports.
12. Click one of the other underlined **blue links** to enter other portals.



[Financial Summary Portal](#)
[SPA Financial Portal](#)
[Sub Acct Portal](#)
[Object Portal](#)
[Labor Portal](#)
[Browse Lists](#)
[Custom Reports](#)
[Help](#)

Run

Excel PDF



Sponsored Programs Reporting

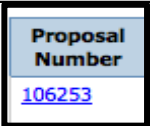
Quick Reference Guide: Generating Proposal Reports

Instructions: Use the steps below to generate **Proposal Reports** from the **Sponsored Programs Register Portal** in eData. For more information about reports in eData, refer to **Understanding the eData Interface Job Aid**.

Proposal Reports include:

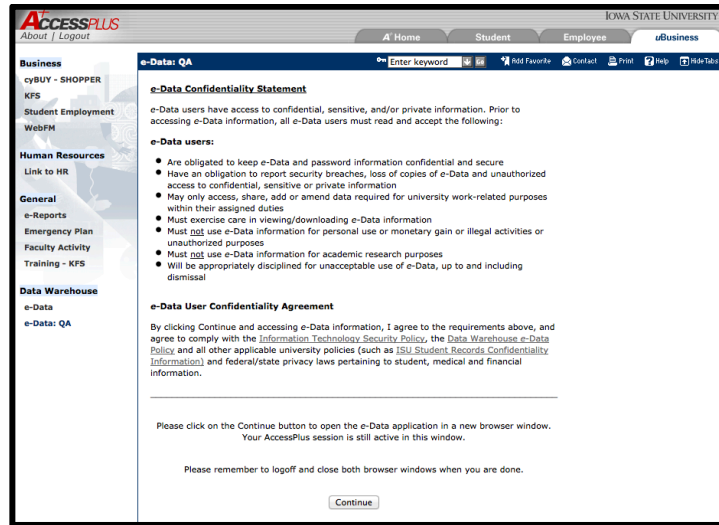
Report Type (Radio Buttons)	Description
Proposal Report	This report generates a list of proposals based on the filter selection and provides aggregate information such as proposal amounts, counts, and proposed indirect and direct cost. Shows Principal Investigators only.
Investigator Org Unit	This reports sorts information by Investigator Org Unit and Investigator Org Dept. The filters labeled Org Unit and Org Dept will filter the Investigator Org Unit and Investigator Org Dept fields (as opposed to the other reports where those filters are applied to Lead Org Unit and Lead Org Dept fields). <i>Note:</i> Since an investigator can list a department and a center on page 2 of the GoldSheet, it is possible for the proposal to be listed twice on this list.
Lead Org Unit	This report displays the list of proposals based on filters selected and by lead org unit and department listed on the Goldsheet. The report includes PIs and COIs.
Sponsor Report	This report sorts proposals by primary sponsor and lists PIs only. Also allows you to view information by “Report Type” where you can “View Flow Through Only” or “View Flow Through and Sponsor”.
Graphs by Count	This report allows you to view proposals by pie chart and table with corresponding amounts based on the total counts to be generated. Also allows you to view graph by Sponsor Type, Activity Type, Proposal Status and Lead Org Unit. An export to Excel will export the pie chart and the table but not the Total line. After exporting the data, you can create a Total line in Excel using the SUM function.
Graphs by Dollars	This report allows you to view proposals by pie chart and table with corresponding amounts based on the total dollars to be generated. Also allows you to view graph by Sponsor Type, Activity Type, Proposal Status and Lead Org Unit.

Links within the Proposal Report Data include:

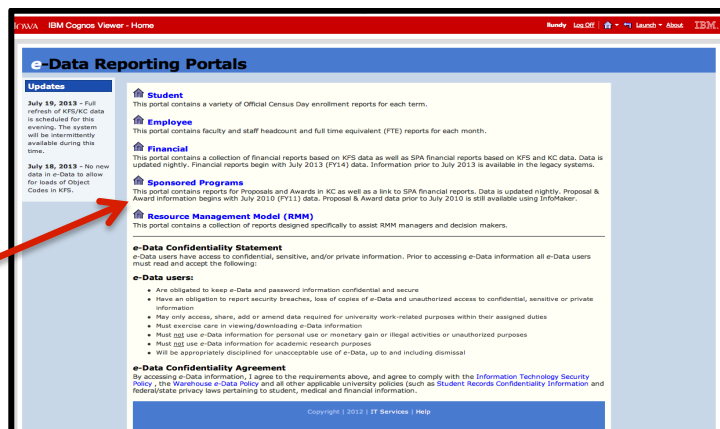
Proposal Number Link	Description	Visual Cue
Proposal Number link to Proposal Detail	This link takes you to the Proposal Detail screen displaying summary information such as recommitted totals, requested start and end dates, proposed direct costs, proposal status and awards. If there is an award, a link will appear in the Award section of the Proposal Detail report.	

Quick Reference Guide: Generating Proposal Reports

1. Log into AccessPlus and enter your University ID and Password.
2. Click the **uBusiness** tab
3. Click **eData**, then **Continue**.



4. Click **Sponsored Programs** on the blue homepage to enter the **Sponsored Programs Register Portal**.



5. Click **Here** on the **Activity Detail Reports** graph.



Quick Reference Guide: Generating Proposal Reports

6. Click [Here](#) for Proposal Reports on the Proposals graph.

Proposals		
Sponsor Type	Proposal Number	Proposal Amount
Commodity	346	\$38,188,455
Federal	2746	\$1,951,303,919
Foreign Federal Government	3	\$612,499
Foreign Higher Education	23	\$2,927,029
Foreign Industry/Corporate	68	\$9,598,937
Foreign Nonprofit Organization	11	\$8,170,538
Higher Education	899	\$213,650,250
Industry/Corporate	1062	\$135,814,865
ISU Research Foundation	17	\$367,624
Local Iowa Govt/School District	71	\$2,280,661
Non-Iowa State & Local Government	59	\$8,431,553
Nonprofit Organization	655	\$97,309,819
State of Iowa Government	586	\$83,160,820
Total	6546	\$2,551,816,969

Click [Here](#) for Proposal Reports
Click [Here](#) for Proposal Status Tracking

7. Select one Report Title from the Report List in the top left corner of the Proposal Report screen.
8. Select one or more Report Filters from the dropdown menus.

IOWA STATE UNIVERSITY
Proposal Report
Proposal Report

☒ Proposal Report
☐ Investigator Org Unit
☐ Lead Org Unit
☐ Sponsor Report
☐ Graphs by Count
☐ Graphs by Dollars

Org Unit
All Org Units
Org Dept
All Org Depts
Investigators
All Investigators

9. Select the correct date range using the **Submit Date Between** filter.
10. Click the yellow **Run** button to produce a report.
11. Click the **Excel** or **PDF** buttons to view, download, or print reports.
12. Click one of the other underlined blue links to view detailed information or link to other portals.

Submit Date between
Jul 1, 2010
and
Jun 30, 2025
Run
Excel
PDF
Award Reports
Proposal Summary
Custom Reports

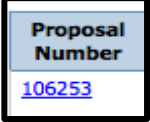
Quick Reference Guide: Generating Proposal Status Tracking Reports

Instructions: Use the steps below to generate **Proposal Status Tracking Reports** from the **Sponsored Programs Register Portal** in eData. For more information about reports in eData, refer to the **Understanding the eData Interface Job Aid**.

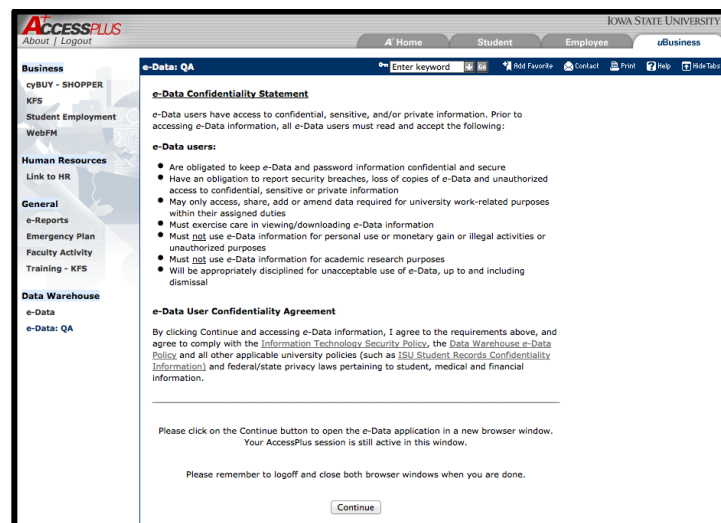
Proposal Status Tracking Reports include:

Report Type (Radio Buttons)	Description
Report by Investigator	This report generates a list of proposals based on the filter selection and provides information by Investigator, the Investigator Org Unit and Dept, Lead Org Unit and Dept, and proposal status and other details. A direct link to the proposal and award (if funded) is also available in this report.
Report by Lead Org	This report generates a list of proposals based on the filter selection, provides information by Lead Org Unit and Dept, and offers proposal status and other details. A direct link to the proposal and award (if funded) is also available in this report.

Links within the Proposal Report Data include:

Proposal Number Link	Description	Visual Cue
Proposal Number link to Proposal Detail	This link takes you to the Proposal Detail screen displaying summary information such as recommitted totals, requested start and end dates, proposed direct costs, proposal status and awards. If there is an award, a link will appear in the Award section of the Proposal Detail report.	

1. Log into **AccessPlus** and enter your **University ID** and **Password**.
2. Click the **uBusiness** tab
3. Click **eData**, then **Continue**.



Quick Reference Guide: Generating Proposal Status Tracking Reports

- Click **Sponsored Programs** on the blue homepage to enter the **Sponsored Programs Register Portal**.



- Click **Here** on the **Activity Detail Reports** graph.



- Click **Here** for **Proposal Status Tracking** on the **Proposals** graph.

Proposals		
Sponsor Type	Proposal Number	Proposal Amount
Commodity	346	\$38,188,455
Federal	2746	\$1,951,303,919
Foreign Federal Government	3	\$612,499
Foreign Higher Education	23	\$2,927,029
Foreign Industry/Corporate	68	\$9,598,937
Foreign Nonprofit Organization	11	\$8,170,538
Higher Education	899	\$213,650,250
Industry/Corporate	1062	\$135,814,865
ISU Research Foundation	17	\$367,624
Local Iowa Govt/School District	71	\$2,280,661
Non-Iowa State & Local Government	59	\$8,431,553
Nonprofit Organization	655	\$97,309,819
State of Iowa Government	586	\$83,160,820
Total	6546	\$2,551,816,969

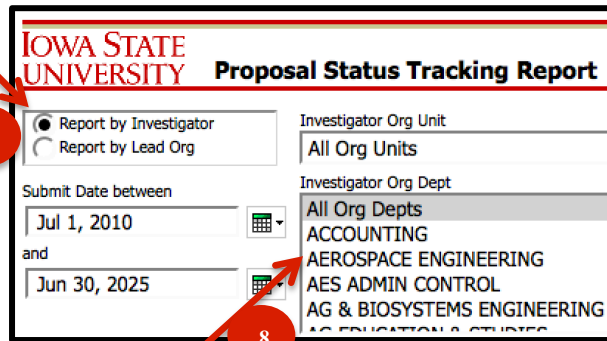
Click [Here](#) for Proposal Reports
Click [Here](#) for Proposal Status Tracking

Quick Reference Guide: Generating Proposal Status Tracking Reports

7. Select one **Report Title** from the **Report List** in the top left corner of the **Proposal Status Tracking Report** screen.

8. Select one or more **Report Filters** from the dropdown menus.

Note: You can choose more than one selection in the Investigator Org Unit and Investigator Org Dept filters.



IOWA STATE UNIVERSITY **Proposal Status Tracking Report**

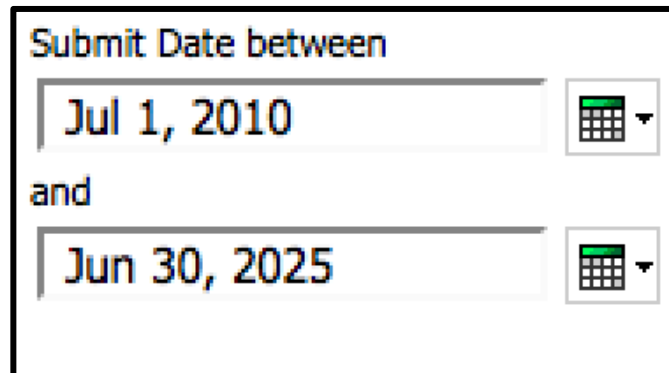
☒ Report by Investigator
☐ Report by Lead Org

Investigator Org Unit
 All Org Units

Investigator Org Dept
 All Org Depts
 ACCOUNTING
 AEROSPACE ENGINEERING
 AES ADMIN CONTROL
 AG & BIOSYSTEMS ENGINEERING
 AG EDUCATION & STUDIES

Submit Date between
 Jul 1, 2010 and Jun 30, 2025

9. Select the correct date range using the **Submit Date between** filter.



Submit Date between

Jul 1, 2010 and Jun 30, 2025

10. Click the yellow **Run** button to produce a report.
11. Click the **Excel** or **PDF** buttons to view, download, or print reports.



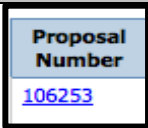
Run Excel PDF

Quick Reference Guide: Generating Proposal Reports by Investigator

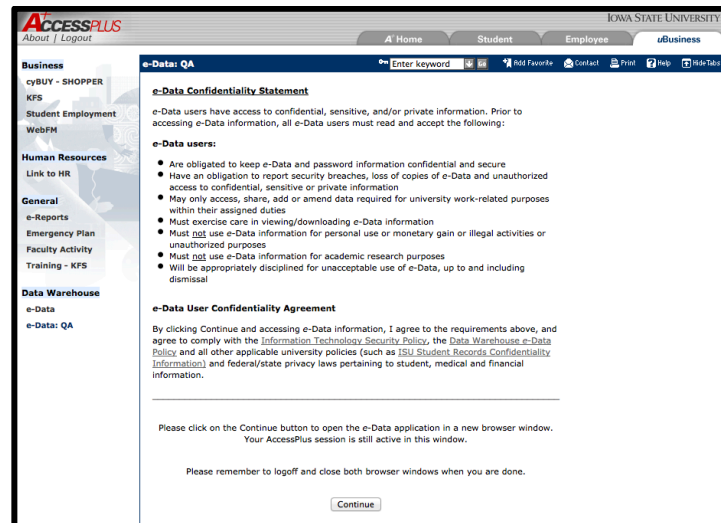
Instructions: Use the steps below to generate **Proposal Reports by Investigator** from the **Sponsored Programs Register Portal** in eData. For more information about reports in eData, refer to the **Understanding the eData Interface Job Aid**.

Proposal Reports by Investigator include:

Report Type (Radio Buttons)	Description
All Proposals	This report generates a list of proposals based on the filter selection and provides aggregate information such as proposal amounts, counts, and indirect and direct costs. It also shows proposal title, number, status, start and end dates, and Investigator's name and role.
Pending Proposals	This report allows you to view proposals by those pending approval and by proposal (also called GoldSheet number). The "Sort By" drop down filter allows user to look up proposal numbers or amounts. Also offers sponsor information, proposed direct and indirect cost, and proposed start and end dates. <i>Note:</i> Only the PI is listed on this report.
Investigator Contribution	This report shows all investigators on the proposal and their intended contributions and percentage amounts for the proposal.
Summary By Fiscal Year	This report shows a summary of indirect, direct, and total proposal amounts by fiscal year. The role of the investigator is also included in this report.

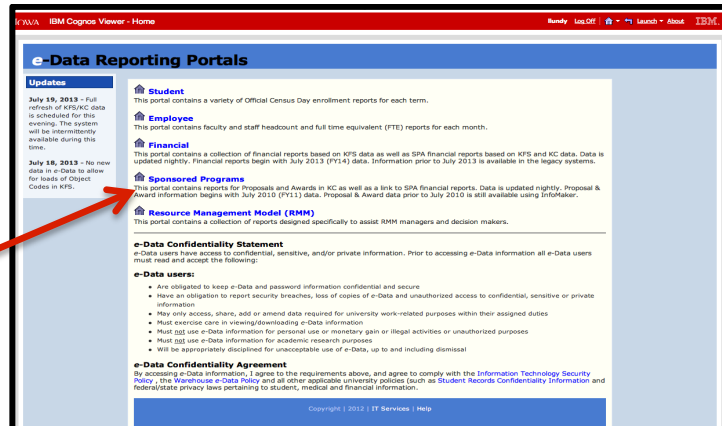
Proposal Number Link	Description	Visual Cue
Proposal Number link to Proposal Detail	This link takes you to the Proposal Detail screen displaying summary information such as recommitted totals, requested start and end dates, proposed direct costs, proposal status and awards. If there is an award, a link will appear in the Award section of the Proposal Detail report.	

1. Log into **AccessPlus** and enter your **University ID** and **Password**.
2. Click the **#Business** tab
3. Click **eData**, then **Continue**.



Quick Reference Guide: Generating Proposal Reports by Investigator

- Click **Sponsored Programs** on the blue homepage to enter the **Sponsored Programs Register Portal**.

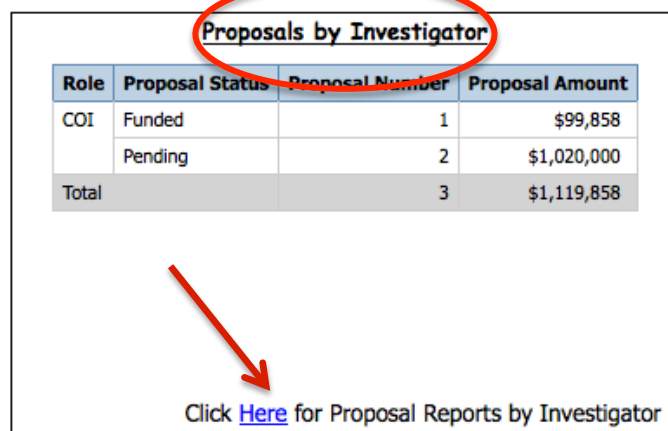


- Choose the Investigator's name from the drop down menu on the **Sponsored Programs Register Portal** screen.
- Click **Here** to enter the **Investigator Detail Reports** portal.

Note: This link will appear only after you select an Investigator's name.



- Click **Here** on the **Proposals by Investigator** graph.



Quick Reference Guide: Generating Proposal Reports by Investigator

8. Select one **Report Title** from the **Report List** in the top left corner of the **Sponsored Programs Investigator Detail** screen.

9. Select one or more **Report Filters** from the dropdown menus.

IOWA STATE UNIVERSITY Sponsored Programs Investigator Detail - Proposal Reports
All Proposals

☒ All Proposals
☐ Pending Proposals
☐ Investigator Contribution
☐ Summary by Fiscal Year

Sponsor Type: All Sponsor Types
Sponsor Name: All Sponsors
Investigators: AALETI, SRIRAM REDDY
Activity Type: All Activity Types

10. Click the yellow **Run** button to produce a report.

11. Click the **Excel** or **PDF** buttons to view, download, or print reports.

Run Excel PDF

Quick Reference Guide: Generating Award Reports

Instructions: Use the steps below to generate **Award Reports** from the **Sponsored Programs Register Portal** in eData. For more information about reports in eData, refer to the **Understanding the eData Interface Job Aid**.

Award Reports include:

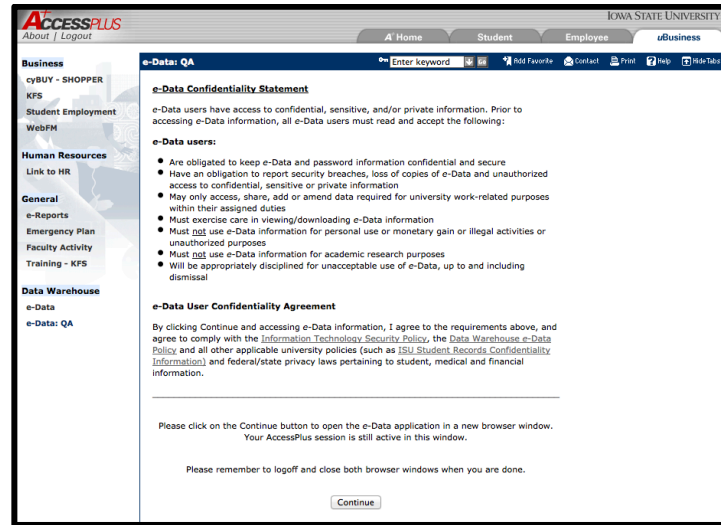
Report Type (Radio Buttons)	Description
Award Report	This report generates a list of awards based on the filter selection and provides aggregate information such as total cost, counts, and indirect and direct cost. Shows activity by Award Register Date and Principal Investigators only. Also provides Award Count, Award Total, Total Direct Cost, and Total Indirect Cost summary information. Monies may come in at different times during the life of an award.
Investigator Org Unit	This report provides award count summary information by investigator org unit. Since an investigator can list a department and a center on page 2 of the GoldSheet, it is possible for an award to show up twice on this list.
Lead Org Unit	This report displays the list of awards by the lead org unit listed on the Goldsheet, including the PI and COI. Also provides Award Amounts, Direct Cost and Indirect Cost information per award, and award numbers that link to details.
Sponsor Report	This report allows you to view sponsor by name and type. To distinguish awards from sub-awards, the Report Type drop down in the report area allows you to “View Flow Through Only” or “View Flow Through and Sponsors” to report information about the Prime Sponsor (primary source of funds) and Sponsor (secondary source of funds).
IDC/DC Ratio	This report provides a simplified (non-modified) ratio in a summary format of indirect cost, direct costs, and award amounts. Also allows you to view awards by “Report Type”.
Graphs by Count	This report allows you to view awards by pie chart and table with corresponding amounts based on the total counts generated. Sort by Sponsor Type, Award Count, and Award Amount.
Graphs by Dollars	This report allows you to view awards by pie chart and table with corresponding amounts based on the total counts generated by Sponsor Type, Award Count, and Award Amount.

Links within the Proposal Report Data include:

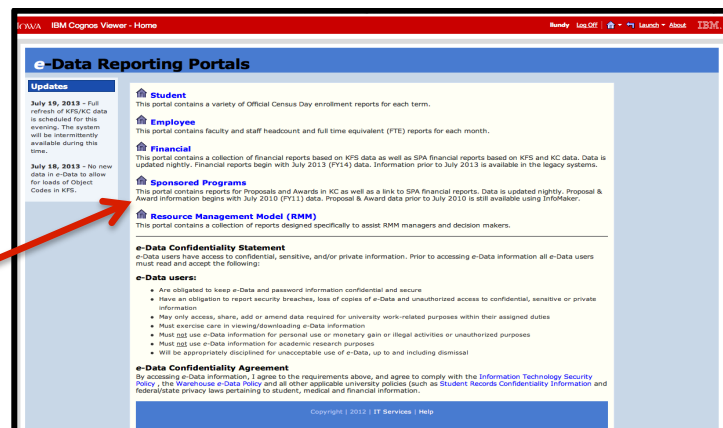
Award Number Link	Description
Award Number link to Award Detail	This link takes you to the Award Detail screen displaying summary information such as start dates, direct costs, etc. If the award is connected to a proposal, links to the Proposal Detail report are also available on this detail screen. Additionally, if an associated account(s) is listed, an account link will also be available.

Quick Reference Guide: Generating Award Reports

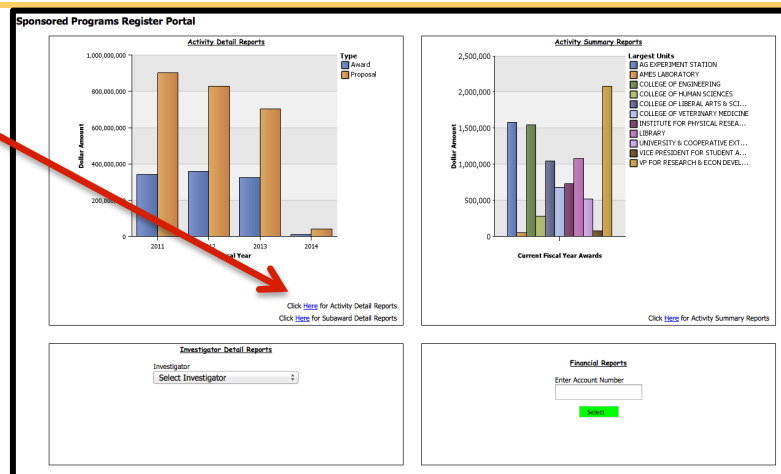
1. Log into AccessPlus and enter your University ID and Password.
2. Click the **uBusiness** tab
3. Click **eData**, then **Continue**.



4. Click **Sponsored Programs** on the blue homepage to enter the **Sponsored Programs Register Portal**.

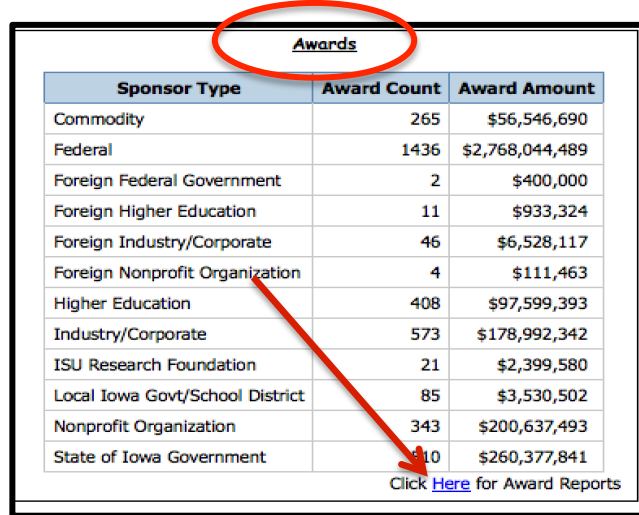


5. Click **Here** on the **Activity Detail Reports** graph.



Quick Reference Guide: Generating Award Reports

6. Click [Here](#) for Award Reports on the Awards graph.

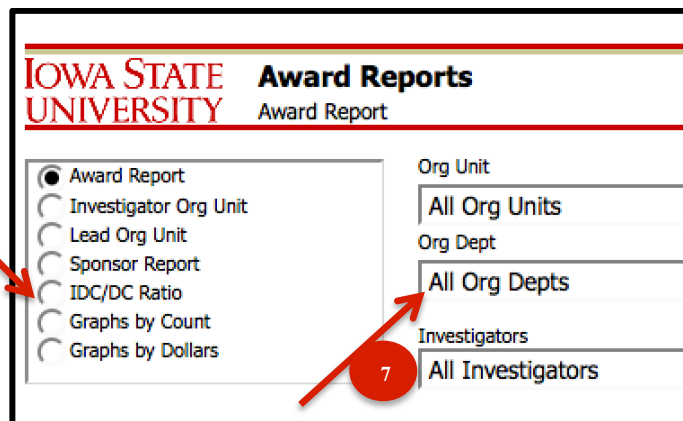


Awards		
Sponsor Type	Award Count	Award Amount
Commodity	265	\$56,546,690
Federal	1436	\$2,768,044,489
Foreign Federal Government	2	\$400,000
Foreign Higher Education	11	\$933,324
Foreign Industry/Corporate	46	\$6,528,117
Foreign Nonprofit Organization	4	\$111,463
Higher Education	408	\$97,599,393
Industry/Corporate	573	\$178,992,342
ISU Research Foundation	21	\$2,399,580
Local Iowa Govt/School District	85	\$3,530,502
Nonprofit Organization	343	\$200,637,493
State of Iowa Government	10	\$260,377,841

Click [Here](#) for Award Reports

7. Select one Report Title from the Report List in the top left corner of the Award Report screen.

8. Select one or more Report Filters from the dropdown menus.



IOWA STATE UNIVERSITY Award Reports
Award Report

☒ Award Report
☐ Investigator Org Unit
☐ Lead Org Unit
☐ Sponsor Report
☐ IDC/DC Ratio
☐ Graphs by Count
☐ Graphs by Dollars

Org Unit

 Org Dept

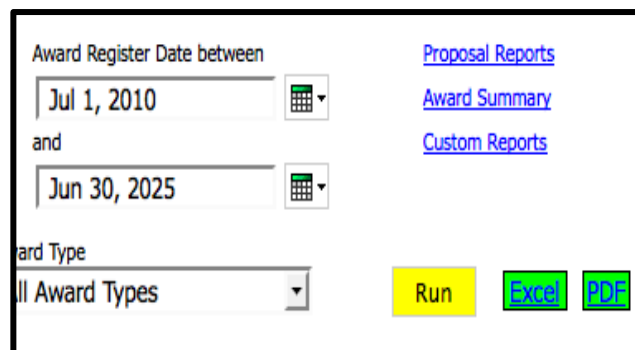
 Investigators

9. Select the correct date range using the Award Register Date between filter.

10. Click the yellow Run button to produce a report.

11. Click the Excel or PDF buttons to view, download, or print reports.

12. Click one of the other underlined blue links to view detailed information or link to other portals.



Award Register Date between

 and

 Award Type

[Proposal Reports](#)
[Award Summary](#)
[Custom Reports](#)

Quick Reference Guide: Generating Award Reports by Investigator

Instructions: Use the steps below to generate **Award Reports by Investigator** from the **Sponsored Programs Register Portal** in eData. For more information about reports in eData, refer to the **Understanding the eData Interface Job Aid**.

Award Reports by Investigator include:

Report Type (Radio Buttons)	Description
All Awards	This report generates a list of awards based on the filter selection and provides aggregate information such as award count, amount, direct and indirect costs. Shows Principal Investigators only.
Current Awards	This report generates a list of active awards by award number (assigned by Kuali Coeus) and based on filter selection. It also provides information such as the award count, amount, direct and indirect costs.
Investigator Contribution	This report shows all investigators on the award and their contributions and percentage amounts for the award.
Summary by Fiscal Year	<p>This report generates a list of awards by Investigator, then by Fiscal Year, then by Role. It also provides Investigator, Fiscal Year, Role, Incremental Award Count, Investigator Amount, Direct Amount, Indirect Amount, and Award Amount.</p> <p>Note: For this report, Incremental Award Count is the number of actions that can be attributed to a particular investigator in a specific fiscal year for a specific role (PI or COI). Awards can have multiple actions during their life span, including additional monies, extensions of time, or reductions of funding.</p>
Acct Mngmnt Summary	<p>This report displays the list of accounts and account number assigned to a particular investigator (account manager).</p> <p>Note: For more detailed information, use the account number blue links to navigate to SPA Financial reports.</p>

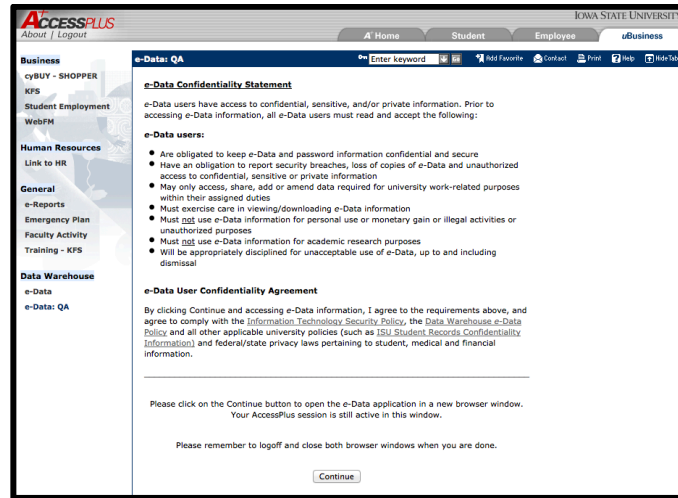
Links within the Proposal Report Data include:

Award Number Link	Description
Award Number link to Award Detail	Provides details of a specific award in one location. If the award is connected to a proposal, the specific proposal number will be an underlined blue link that takes you to the Proposal Detail report. Additionally, if an associated account(s) is listed, clicking on the account number's blue link will take you to the SPA Financial report for that account.

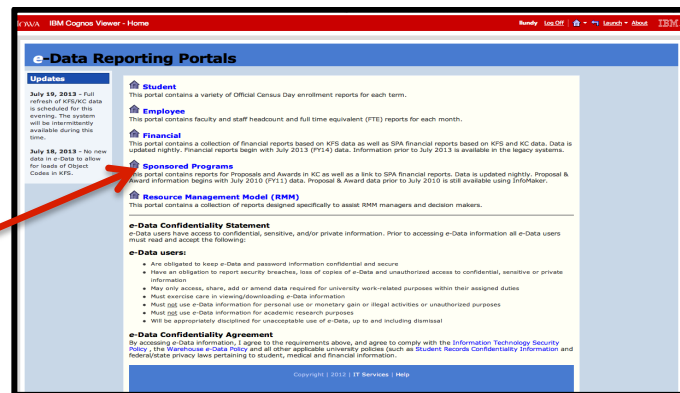
Note: As a Principal Investigator (PI), you can view account numbers and balances associated for your award using the Financial Reports sub-portal on the Sponsored Programs Register portal page. Refer to **View SPA Financial Reports** instructions at the end of this document.

Quick Reference Guide: Generating Award Reports by Investigator

1. Log into AccessPlus and enter your University ID and Password.
2. Click the **uBusiness** tab
3. Click **eData**, then **Continue**.



4. Click **Sponsored Programs** on the blue homepage to enter the **Sponsored Programs Register Portal**.



5. Choose the Investigator's name from the drop down menu on the **Sponsored Programs Register Portal** screen.
6. Click **Here** to enter the **Investigator Detail Reports** portal.

Note: This link will appear only after you select an Investigator's name.



Quick Reference Guide: Generating Award Reports by Investigator

7. Click **Here** on the **Awards by Investigator** graph.

Awards by Investigator			
Role	Award Status	Award Count	Award Amount
COI	Active	1	\$99,858
Total		1	\$99,858

Click [Here](#) for Award Reports by Investigator

8. Select one **Report Title** from the **Report List** in the top left corner of the **Sponsored Programs Investigator Details** screen.
9. Select one or more **Report Filters** from the dropdown menus.

IOWA STATE UNIVERSITY Sponsored Programs Investigator Detail - Award Reports
All Awards

☒ All Awards
☐ Current Awards
☐ Investigator Contribution
☐ Summary by Fiscal Year
☐ Acct Mngmnt Summary

Sponsor Type: All Sponsor Types
 Sponsor Name: All Sponsors
 Investigator: AALETI, SRIRAM REDDY
 Activity Type: All Activity Types

8

10. Click the yellow **Run** button to produce a report.
11. Click the **Excel** or **PDF** buttons to view, download, or print reports.

Run Excel PDF



Troubleshooting

Quick Reference Guide: Configuring Your Browser to Open New Tabs in eData

Instructions: Use the steps below to configure your browser to work in eData.

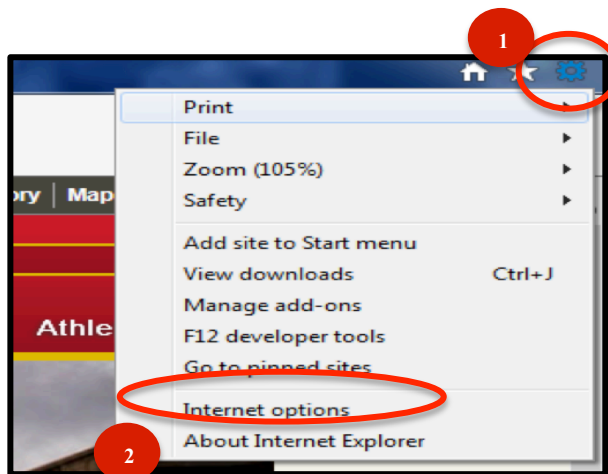
Supported Browsers for eData

Use one of the following browsers to log into eData.

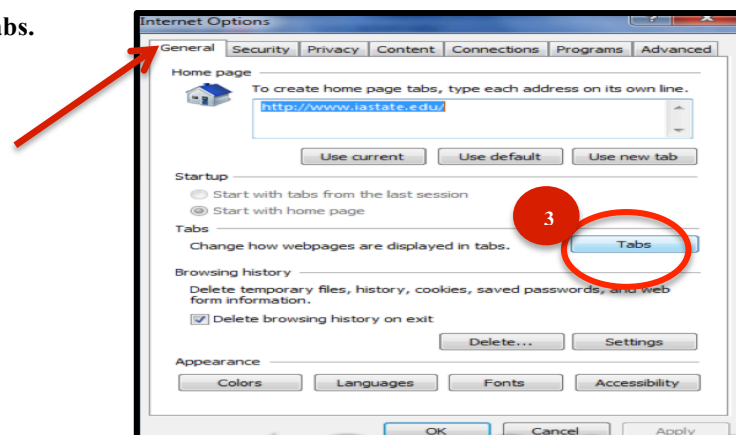
- Internet Explorer 9 or up
- Firefox 12
- Safari 6 or up (optional for MACs)

When Using Internet Explorer

1. Click **Tools** (or the settings wheel icon).
2. Click **Internet Options**.

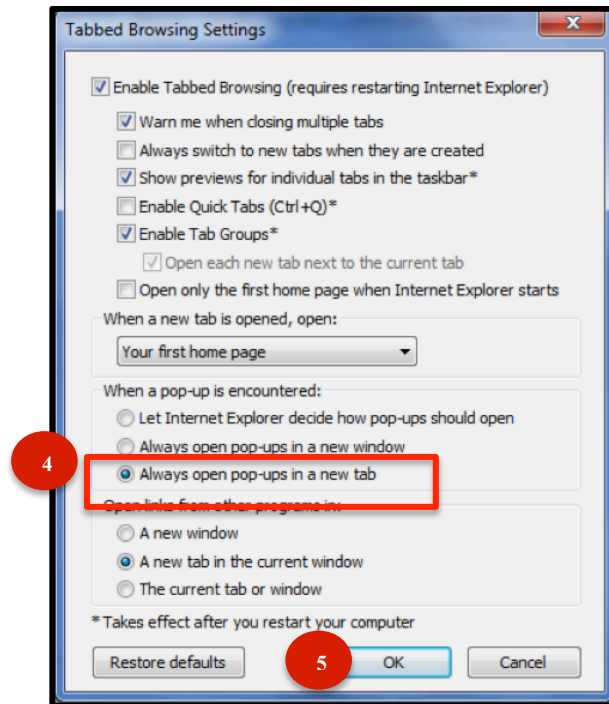


3. On **General** tab, click **Tabs**.



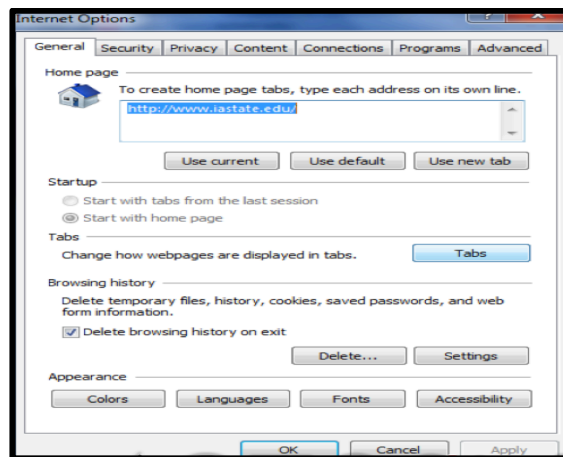
Quick Reference Guide: Configuring Your Browser to Open New Tabs in eData

- Under the **Tabbed Browsing Settings** and heading “When a pop-up is encountered”, check **Always open pop-ups in a new tab**.
- Click **OK** at the bottom of the **Tabbed Browsing Settings** window.



- Click **OK** in the **Internet Options** window.
- Click 'x' to close the settings.

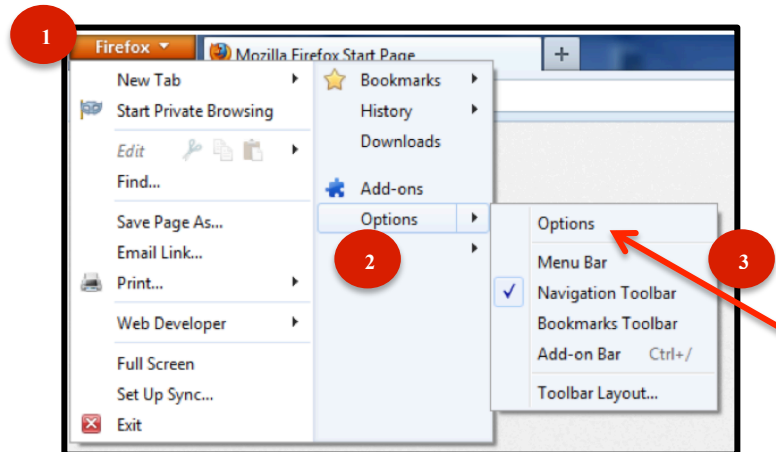
Note: You should now be able to see pop-ups in new tabs instead of new windows.



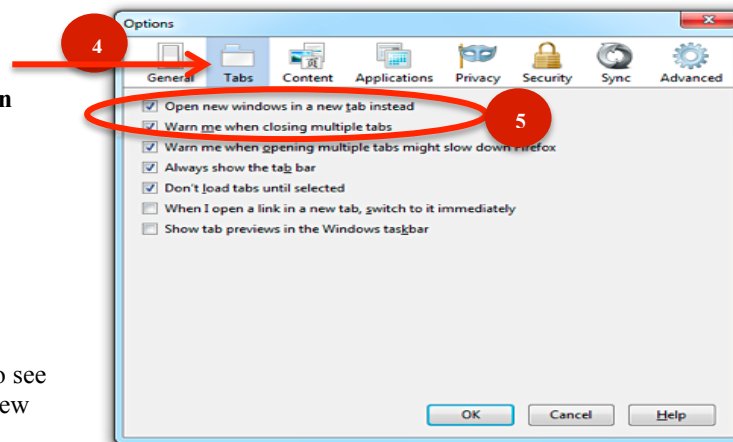
Quick Reference Guide: Configuring Your Browser to Open New Tabs in eData

When Using FireFox

1. Click **Firefox**.
2. Then click **Options**.
3. And **Options** again.



4. Click the **Tabs** icon.
5. Check the option “**Open new windows in a new tab instead**”.
6. Click **OK**.
7. Click ‘x’ to close the settings.




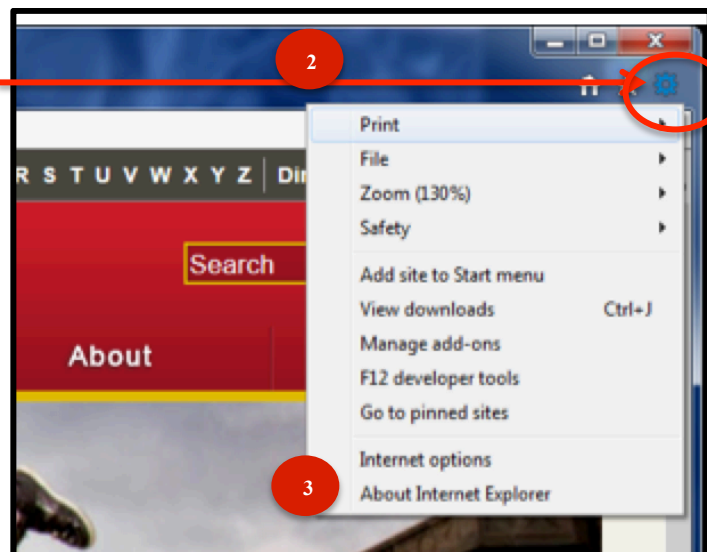
Note: You should now be able to see pop-ups in new tabs instead of new windows.

Quick Reference Guide: Using Internet Explorer (9 or 10) with eData

Instructions: Use the following steps to enable your browser to trust content from eData. These steps will help you to configure Internet Explorer (IE) 10 to log into eData through the local intranet.

Note: Please be sure to update your IE web browser. These instructions are designed to help with the latest versions of IE (9 and 10). Other browsers are not affected and can be used instead of IE.

1. Open **Internet Explorer (IE)**.
2. Click the **Tool**  icon.
3. Click **About Internet Explorer** to view your version of Internet Explorer.



Note: If you are not using Internet Explorer version 9 or 10, please contact the Solution Center to help update your browser.

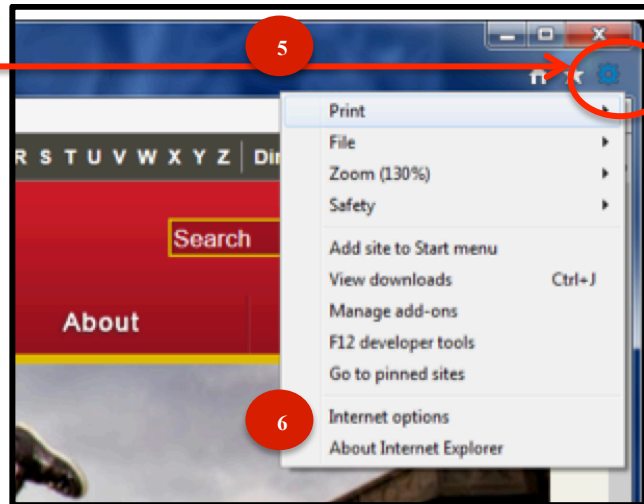
4. Click **Close** to return to your home screen.



Quick Reference Guide: Using Internet Explorer (9 or 10) with eData

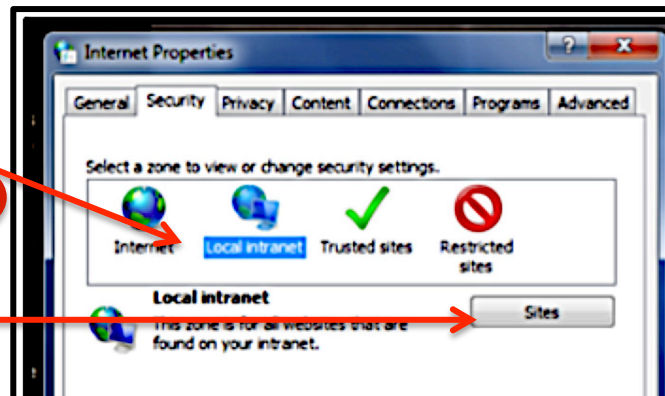
5. Click the **Tool**  icon.

6. Click **Internet options**.

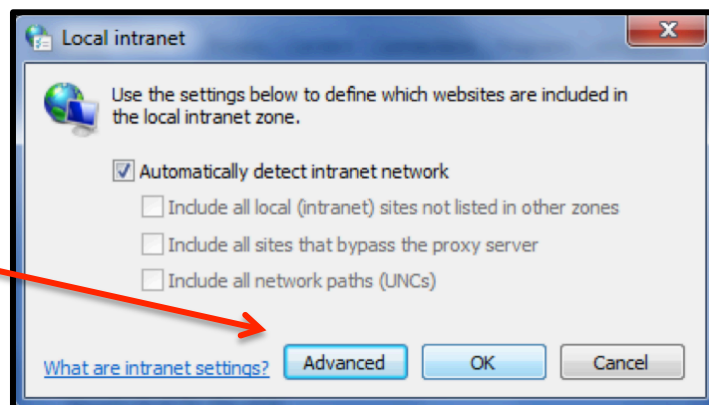


7. Click the **Local intranet** icon on the **Security** tab.

8. Click **Sites**.

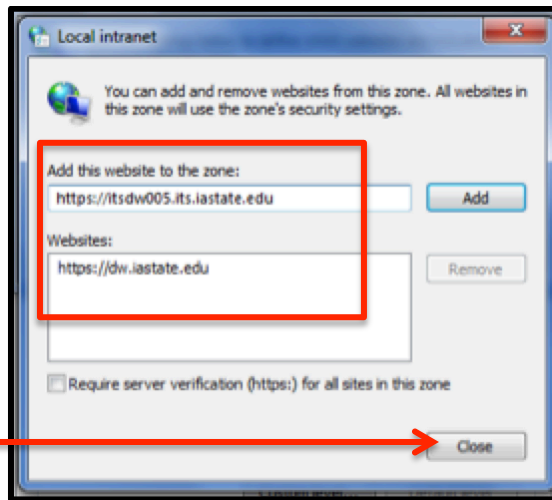


9. Click **Advanced** on the **Local intranet** screen.

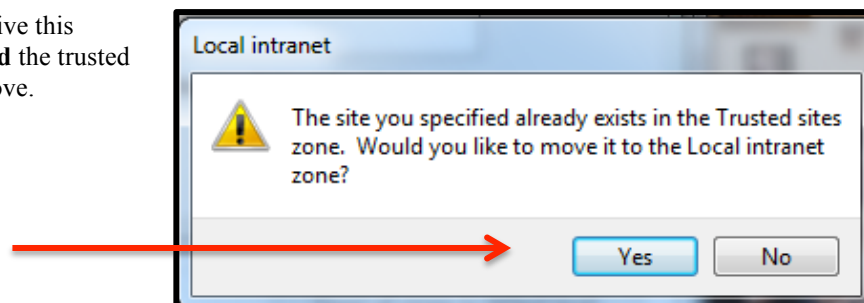


Quick Reference Guide: Using Internet Explorer (9 or 10) with eData

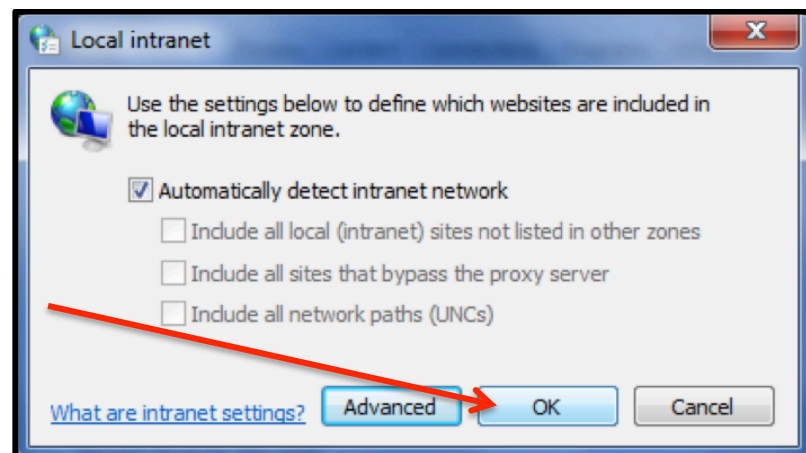
10. Type in <https://dw.iastate.edu> then click **Add**.
11. Type in <https://itsdw005.its.iastate.edu> then click **Add**.
12. Click **Close**.



Note: Click **Yes** if you receive this message when trying to **Add** the trusted sites in **steps 10 and 11** above.

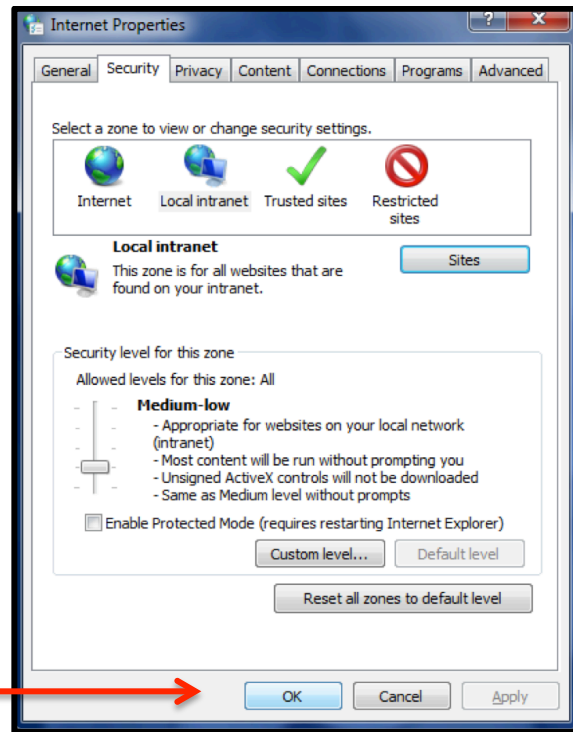


13. Click **OK** on the **Local intranet** screen.



Quick Reference Guide: Using Internet Explorer (9 or 10) with eData

14. Click **OK** on the **Internet Properties** screen.
15. Log into **eData** from **AccessPlus**.




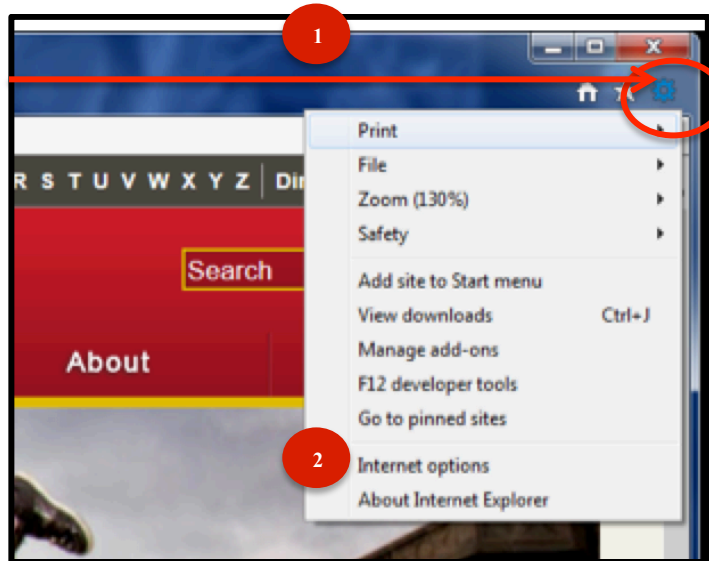
Quick Reference Guide: Exporting eData Reports to Excel Using Internet Explorer

Instructions: Use the following steps in Internet Explorer (IE) to export reports from eData to Excel. If you are using Internet Explorer and trying to export a report using Excel, you will have to configure your computer to trust content from the ITS website and eData.

Note: Please be sure to update your IE web browser. These instructions are designed to help with the latest versions of IE (9 and 10). Other browsers are not affected and can be used instead of IE.

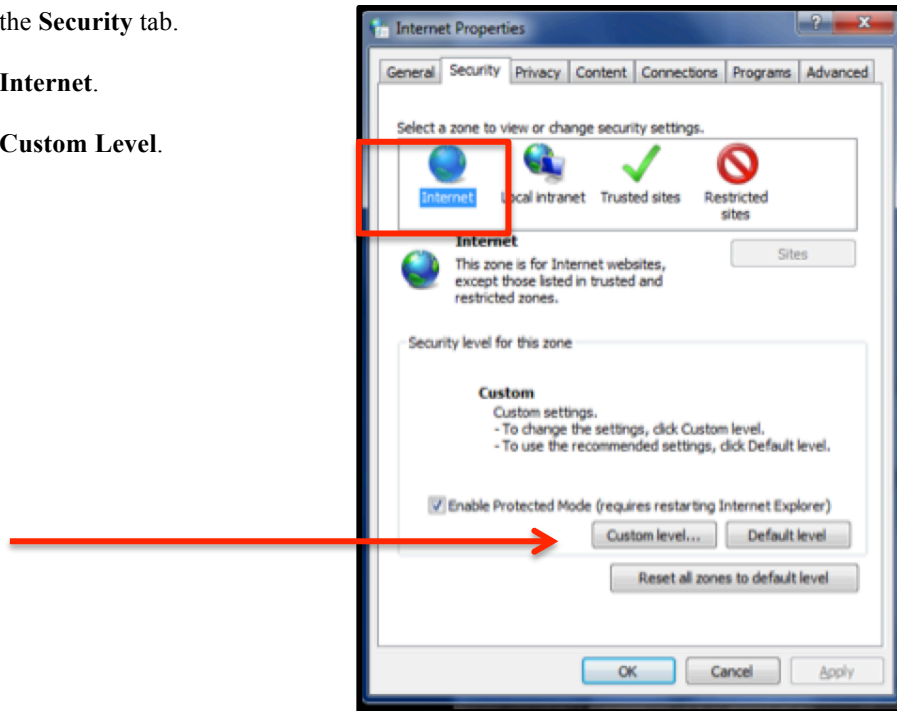
Disable Pop-up Blocker

1. Open **Internet Explorer**.
2. Click the tool  icon in **Internet Explorer**.
3. Click **Internet options**.

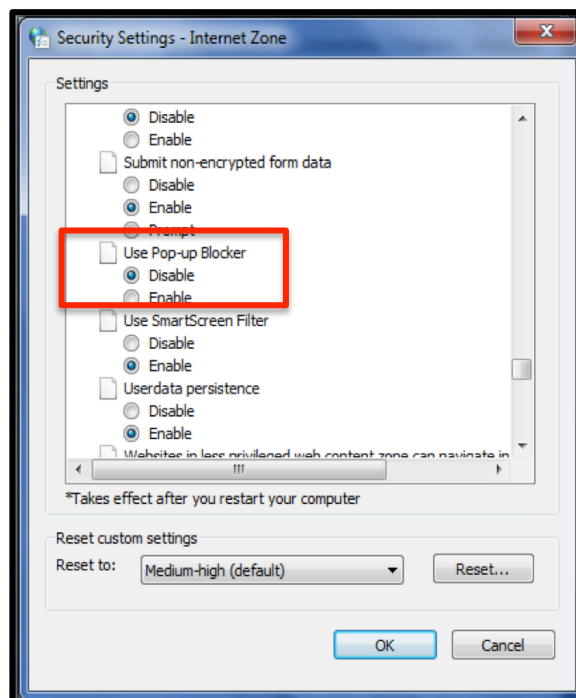


Quick Reference Guide: Exporting eData Reports to Excel Using Internet Explorer

4. Click the **Security** tab.
5. Click **Internet**.
6. Click **Custom Level**.



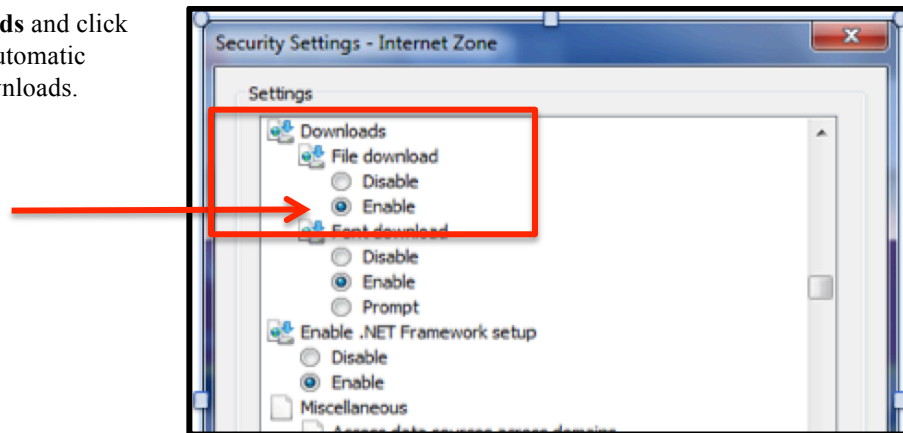
7. Scroll down in the **Settings** box to **Miscellaneous**, then click **Disable** under **Use Pop-up Blocker**.



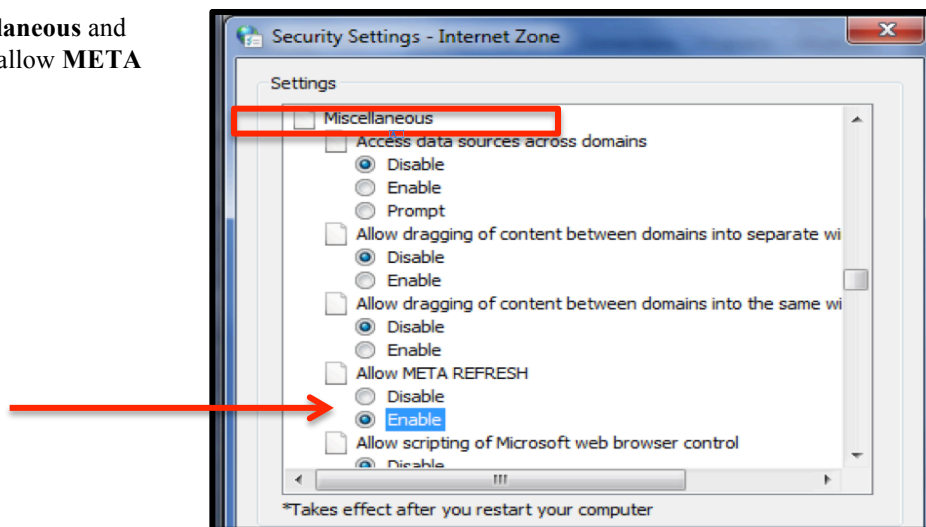
Quick Reference Guide: Exporting eData Reports to Excel Using Internet Explorer

Allow File Downloads

8. Scroll to **Downloads** and click **Enable** to allow automatic prompting for downloads.



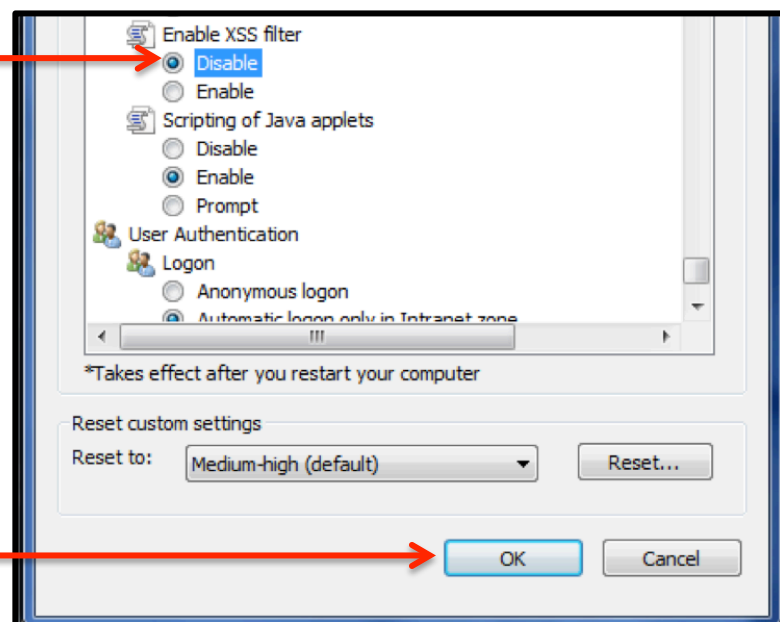
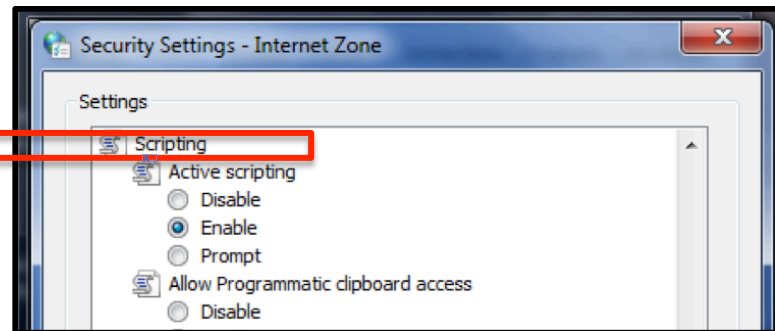
9. Scroll to **Miscellaneous** and click **Enable** to allow META FRESH.



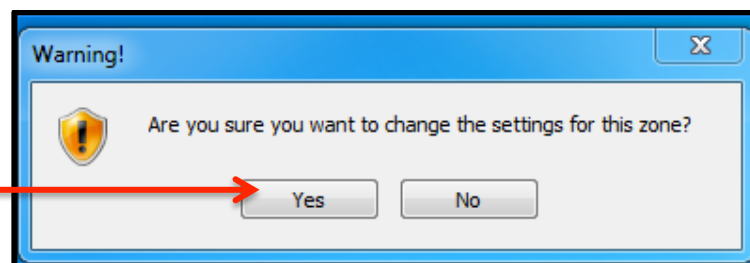
Quick Reference Guide: Exporting eData Reports to Excel Using Internet Explorer

10. Scroll to **Scripting** and click **Disable** under **Enable XSS filter** (cross-site scripting).

11. Click **OK**.



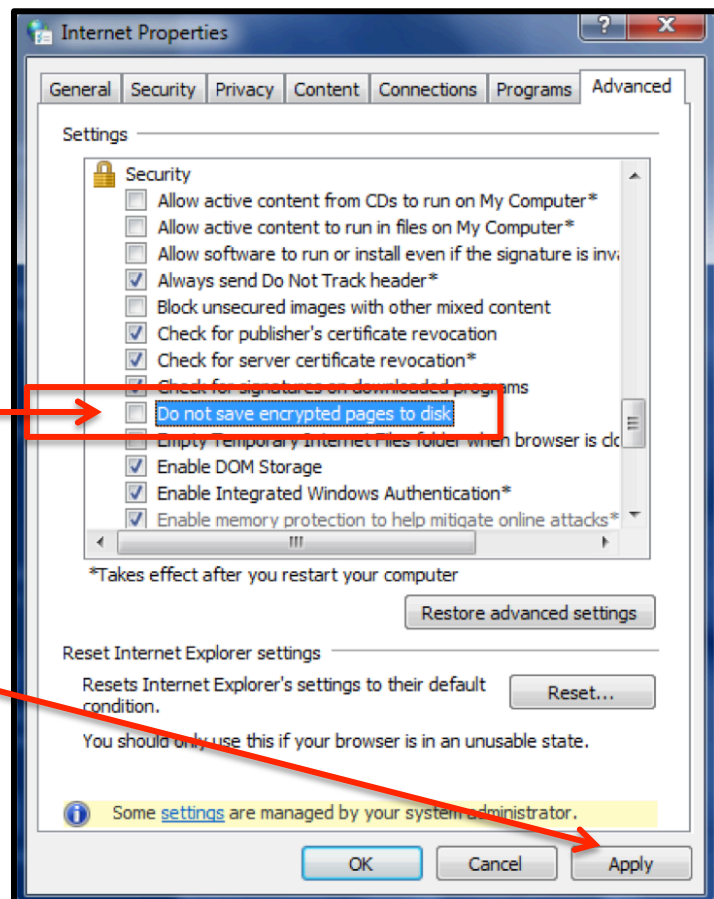
Note: Click **Yes** if you receive this warning box.



Quick Reference Guide: Exporting eData Reports to Excel Using Internet Explorer

Allow Encrypted Pages To Be Saved

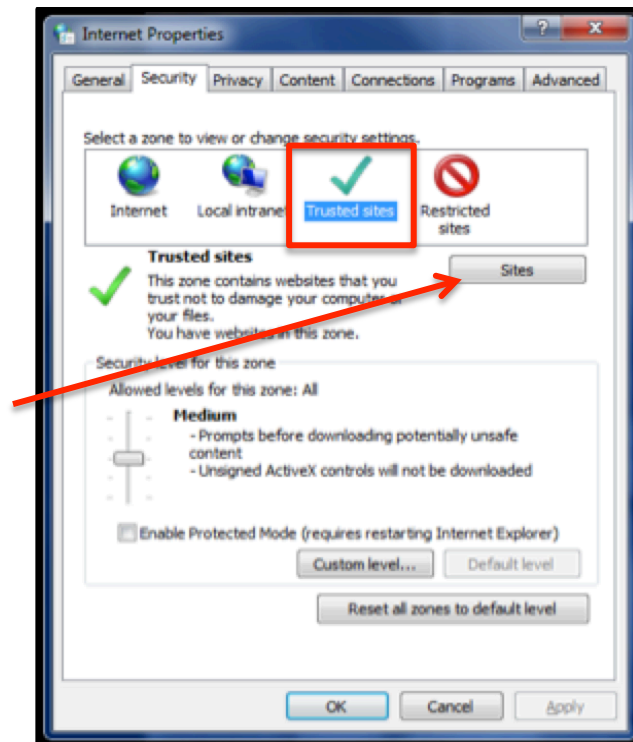
12. Click the **Advanced** tab on the **Internet Properties** screen.
13. Scroll to the **Security** section.
14. Deselect **Do not save encrypted pages to disk**.
15. Click **Apply**.



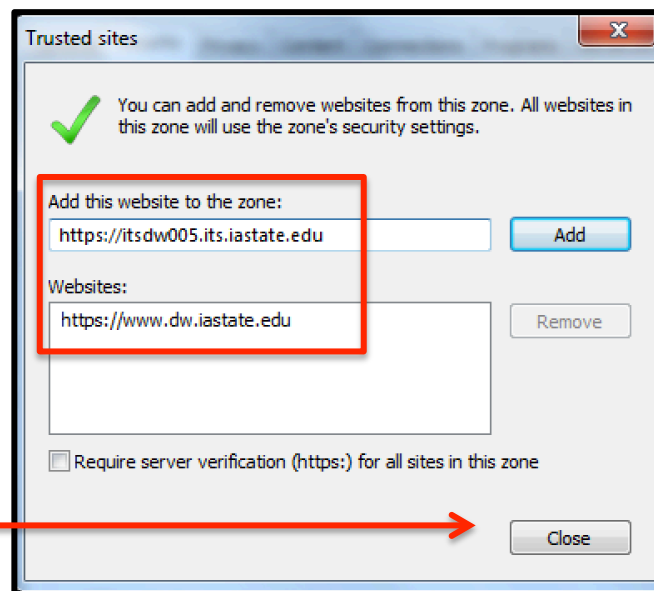
Quick Reference Guide: Exporting eData Reports to Excel Using Internet Explorer

Add eData to Your Trusted Sites

16. Click the **Security** tab on the **Internet Properties** screen.
17. Select **Trusted Sites** then **Sites**.

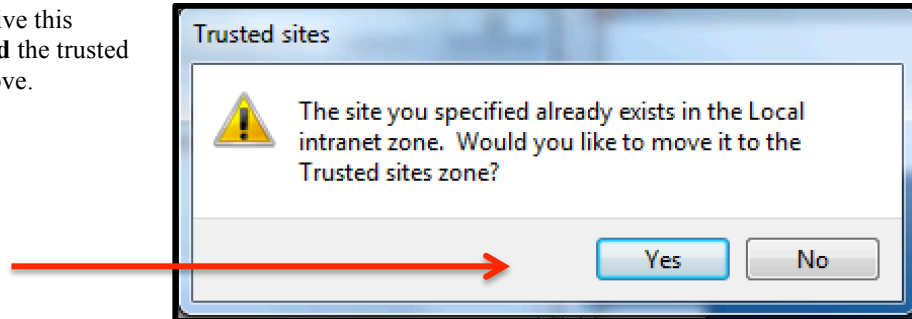


18. Type in <https://dw.iastate.edu> then click **Add**.
19. Type in <https://itsdw005.its.iastate.edu> then click **Add**.
20. Click **Close**.
21. Click **OK** on the **Internet Properties** screen.
22. Log into **eData** from **AccessPlus**.



Quick Reference Guide: Exporting eData Reports to Excel Using Internet Explorer

Note: Click **Yes** if you receive this message when trying to **Add** the trusted sites in **steps 18 and 19** above.



This concludes the User Manual.

For the most updated documentation, please go to:
www.kuali.iastate.edu/training

If you have any questions, please contact the Kuali Trainer or
your Super User:
www.kuali.iastate.edu/support